

# Enable functionality in DesignTool

## *DesignTool Basics*

The DesignTool is built up from different blocks of functionality:

### **MAIN MENU**

The Main menu contains standard options such as New, Open..., Save as... etc. The Main menu is similar to an ordinary menu in a operational system and contains:

*New* – click new to start from a new application. An alert will notify the user that current application data will be lost.

*Open...* – select this option to open an existing application from a local hard disk or server

*Save As...* – Save as... will save the current application to a local hard disk or server. The files will have the extension .dpp

*About* – provides with the version number for the DesignTool

### **PAGES TAB**

Pages are graphical thumbnails of each individual page in the form. It is easy to navigate the different pages and get an overview over the individual pages in the pages tab. Use the keyboard or mouse to select the page to work with.

### **TOOLS TAB**

Tools holds a number of vertical menus that can be flipped up or down. Each tab has different functionality that changes individually depending on choices in other tabs. Read more below for detailed information about the different tabs:

### **MIDDLE SECTION – BACKGROUND AREA**

The background area contains the page that is currently worked on. The canvas can be zoomed and moved:

Zoom - use the sliding bar to zoom in or out the background area

Ctrl+0 - fit to page

Ctrl+1 - 100%

Space bar + drag background - move the background

Page selector - step up or down or type a page number in the page selector if the form contains more than one page

### **PROPERTIES**

In the properties panel widgets and other field related settings can be configured. Widgets are explained in the section "Preparing a form background".

## *Preparing a form background*

A paper application must first be designed in a graphical software that supports export of Acrobat PDF. Professional software such as Adobe Indesign, QuarkXpress, Adobe FrameMaker etc. provides with full control over the graphics layout but any software able to create a PDF file can be used.

Since the digital pen has optics and specific digital features the form has to be designed with this in consideration. Some tips:

Design the fields so that the user can write naturally, too small fields can affect negatively on the recognition result  
Leave space between fields (example: if the send box is too close to a text field or checkbox the user may accidentally send the form due to the optics reading inside the Send widget area  
Do not put graphics too far out in the margin  
Use a supported background page sizes (see below for supported page sizes)

*Note: read more about this in the chapter Forms design*

## *Define the General settings (General settings tab)*

### **GENERAL MENU**

In the General menu some basic settings are defined for the whole application.

#### **Name**

Name the application in a logical way so that it is easy to understand

The application name is used in:

- ...different lists in the Admin interface
- ...the main window in PenPusher
- ...the main window in the PrintProcessor
- ...part of the subject in the email export
- ...part of the default file name in the email export (PDF and xml)
- ...application bar (left) in Formidable Viewer
- ...the forms title in Formidable Viewer
- ...the default PDF file name in Formidable Viewer

#### **Description**

Describe the application in a logical way so that it is easy to understand

The description is used to:

- ...help identifying the application in lists in the Admin interface
- ...help identifying the application in the Formidable Viewer

#### **Upload background**

Click Upload background and select the appropriate PDF background. Multi-page PDF's are supported. All fonts should be embedded in the PDF to guarantee a correct output.

*Supported page sizes:*

- A4 portrait and landscape (210 x 297 mm)
- Legal portrait and landscape (216 x 297 mm)
- Letter portrait and landscape (216 x 279 mm)
- A3 portrait (297 mm x 420 mm)
- Other smaller formats

*Note: The maximum supported size is: (297 x 420 mm), A3 portrait*

*Note: if a PDF background fails to load you may have a broken or incompatible PDF-file. Try to re-save the PDF in a newer version of Acrobat.*

*Note: the maximum size of the PDF is limited to 8 Mb for performance reasons. Larger files will not be accepted. If the file size is too large it is normally possible to optimise the PDF in Acrobat Professional.*

*Note: if an upgraded PDF background with fewer pages is loaded into an existing application, DesignTool will merge the Widgets and Send boxes onto the last page. Send boxes will be removed.*

*Note: if a PDF background with smaller physical size is loaded into an existing application, DesignTool will re-position the Widgets to fit the physical working area.*

### **Application type**

Change between Standard or Limited Application. Please refer to the basic information about Standard and Limited applications.

*Note: If Limited Application is used a number of features are disabled in the other menus due to the limited functionality in Limited Applications*

### **Custom development**

Extend the uses of Formidable with custom functionality. Please refer to the basic information about Custom applications

## **Define the Application settings**

### **APPLICATION MENU**

In the Application menu some application specific settings are configured. These settings apply to the whole application as with the general settings.

#### **Send method**

Send method defines if the application should be used with a mobile device (send via Bluetooth) or with a PC (use a USB cradle for docking). Please refer to the basic information about Mobile or PC use.

*Note : The send method will affect other settings in the DesignTool. Under the tab Widgets you will get a Send box if you use Mobile (Bluetooth). The Send box is unnecessary for PC (USB) use.*

*Note : If the application is designed for mobile use it is actually also possible to dock the pen in PenPusher for Windows and achieve the same result.*

#### **Close form**

Close form decides when the form will be closed. After first send by the pen, never by the pen or when the user writes in a field.

Close form will affect other settings in the DesignTool. Under the tab Feedback feedback messages can be defined to make it clear to the user.

Close form behaviour:

First send - the form will be closed after the first send (this is the only option when using Limited Applications)

Never by pen - the pen can be used to send data as many times as necessary and will never be closed by the pen. If the Formidable Viewer is used the application will be closed when clicking Save & Complete.

Marked by pen - The form will be closed when a specific field has been filled in/marked.

*Note: For a new application the Marked by pen drop-down will be empty. When a widget has been added to the background, it will automatically be available in the Marked by pen drop-down.*

### **Handwriting Recognition**

Enable handwriting recognition by checking the enable box. When the box is checked a new drop down menu appears where the main language can be specified. Specific handwriting widgets will be available in the Widget tab. Read more about handwriting recognition in the basic information for Handwriting Recognition

*Note: When working with the form fields each widget can have different language settings that override the main language.*

### **Allow multiple Send boxes**

Send boxes can be placed out on multiple pages in the same form. This feature is useful when creating notebooks or similar applications where each page allows you to send in everything that has been written on the application. Multiple send boxes should be used with care. It can confuse the user if the application is designed with multiple send boxes.

### **Enable pre-population**

Formidable allows for printing Anoto functionality enabled forms from backend systems including pre-populated textual data. When pre-population is enabled it is possible to design and configure the form to include pre-population of textual data from a back-end system. Formidable works as a “virtual” printer that replaces the back-end system standard printing mechanism. The forms background, the pattern and the textual overlay data is managed in Formidable in all of it's aspects. The DesignTool is used to create a draft of the form layout and to prepare the application for pre-population.

Read more about pre-population in the chapter Pre-population

## **Define field behavior with Widgets**

### **WIDGET MENU**

The Widget menu includes objects that can be used to define fields for handwriting and/or pre-population of textual data.

### **Drag or Find**

A widget can either be dragged out from the Widgets tab or can auto-find an existing field or box in the background. The auto-find function works with checkboxes, boxed fields, single-line and multi-line fields. Select the appropriate widget with a click and put the cursor inside a field on the background and click. It will fill out the field with the selected widget.

### **Widget type**

*Single* – as the label describes a single field widget is used on form fields that are single-line.

*Multi* – multi fields are used typically in notes fields where multiple lines are required

*Boxed* – boxed fields are used for boxed field layouts

*Checkbox* – use when boxes should be used as checkboxes or “radio buttons”

*Statement* – the functionality statement from Anoto must be located on each page of the form.

*Start box* – the start box is only visible when using the Application Type Limited. The start box is recommended on the first page in a form to avoid losing data.

*Send box* – the send box is visible when using the send method Mobile. When marking the box with the pen tip the data will be transferred to the mobile device automatically.

Widgets are configured in the properties panel on the right side of the form background. The widgets can be moved or resized by either dragging the lines or anchor points or typing in the values in the properties window. Depending on widget type different options are available in the properties panel. The main functions in the properties panel are:

### **Widget type**

*Widget type* – identifies which type of field it is (single, multi, boxed or checkbox)

*Name* – the name is auto-generated but can be changed according to the users requirements. It is the field name that will end up in the xml file for export to an external system and/or to define the pre-population fields. Only a-z, 0-9 and \_ (underscore) is supported.

*Boxes* – only applicable when using Boxed field widget. Allows for adjusting the number of boxes in the field, either by clicking the arrows or by typing in the number..

*Checked value* – only applicable when using checkboxes

*Note: Name is case sensitive. As a consequence Textfield1 and textfield1 are considered two different unique fields.*

### **Groups**

Groups are similar to radio buttons. The last checked checkbox is considered the selected button and only one value is valid.

*Group* – A checkbox must be part of a group. Type the group name in the Group box and click +. The group will be added to the drop down menu and the group can be selected for the checkboxes. Click – to remove the group

*Label* – Label is the name that will be presented for the group in the Viewer and in the XML file

*Checked value* – the text that will appear in the XML if the field is selected (see name above for more info)

### **Position & Size**

Allows for adjusting the fields manually in size and position

*Position (x, y)* – presents the top-left corner position of the widget

*Size (w, h)* – presents the width and height of the field

### **Handwriting Recognition**

This option is activated when the option Handwriting Recognition is enabled in the Applications menu to the left

*Language* – overrides the global recognition language settings for the specific field if necessary

*Format 1* – pre-defined formats for standard fields such as first name, last name, country, city, phone, number, email address etc. are available to help improve the handwriting recognition result.

*Format 2* – Standard and custom (read more below) formats can be combined by clicking the + (plus) icon. Up to five formats can be combined.

*Note: Handwriting Recognition fields can be combined with pre-population fields if necessary. Read more further down in the paragraph about Pre-population*

*Note: Custom formats can be created to enable specific dictionaries to improve handwriting recognition result. By adding a custom format with specific words the recognition result will increase dramatically. Read more in the chapter Create custom formats*

### **Viewer**

The Viewer is Formidables own validation interface where the user or administrator can check and edit the result from the written form. In this menu it is possible to configure the appearance of the fields

*Presentation* – The field can be set to Hide, View or Edit. Hide will hide the field in the Viewer, view will show the field and Edit will enable the user to correct spelling errors before sending the result into the backend system.

*Label* – will be presented as a label to the specific field in Viewer. Supports all characters except | (pipe) and \ (backslash).

### **PRE-POPULATION**

A pre-population field can be used alone or together with handwriting recognition. Select a field that shall have pre-populated text. Depending on the widget type different options for design are available:

#### **Single line fields**

*Font* – Choose between Helvetica, Courier and Times

*Font style* – Choose between Regular, Italic, Bold and Bold Italic

*Size* – Select the size of the font

*Offset (x, y)* – Position the text in the field according to your personal preferences

*Sample text* – Use sample text to show result on screen and on printed paper

#### **Multi line fields**

*Font* – Choose between Helvetica, Courier and Times

*Font style* – Choose between Regular, Italic, Bold and Bold Italic

*Size* – Select the size of the font

*Offset (x, y)* – Position the text in the field according to your personal preferences

*Sample text* – Use sample text to show the result on screen and on printed paper

*Line spacing* – Specify the line spacing manually if necessary

#### **Boxed fields**

*Font* – Choose between Helvetica, Courier and Times

*Font style* – Choose between Regular, Italic, Bold and Bold Italic

*Size* – Select the size of the font

*Offset (x, y)* – Position the text in the field according to your personal preferences

*Sample text* – Use sample text to show result on screen and on printed paper

### **Checkboxes**

*Offset (x, y)* – Position the X in the checkbox field according to your personal preferences

*Sample mode* – mark this if you want the sample printout to include a mark in the checkbox

*Note: Read more about Pre-population in the chapter Pre-population*

## *Define custom feedback for response messages*

### **FEEDBACK MENU**

Allows for text messages to be sent back from Formidable to the mobile phone or PC via PenPusher. Provides with a easy to understand approach where the user can follow the progress in the phone or PC.

This is important to notify the user of the status of the form in different situations.

- *Closed* – this message will inform the user when the form is closed
- *Already closed* – this message will inform the user if a form is sent in after it has been closed
- *Data added* – this message will inform the user when the forms data is added to the result without closing the form

## *Delivery options*

### **DELIVER MENU**

In this tab the delivery options can be specified. The standard delivery method is email but it is also possible to create a custom application and use another delivery method such as ftp, web services etc. Read more in the chapter Custom applications.

#### **E-mail export**

Will automatically send out an email containing an Acrobat PDF and an xml-file including the recognised data for each submit. The PDF will include the forms background and the handwriting.

*Email* – email address for the delivery

*Cc writer* – will send a copy to the user information that PenPusher is registered with

*Subject* – replaces the standard subject with a custom subject

*From* – replaces the default email from address with a custom sender

*File name* – replaces the default file name with a custom name

#### **Viewer export**

All forms will be visible in the Viewer interface. The email address is the destination where the final result will be sent after validation in the Viewer.

## *Run the application in Formidable*

When the application has been prepared it is time to install it in Formidable.