Forms Online

User Manual

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Standard Forms
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Once a form has been downloaded/opened it will be available as a *local* copy and can be opened subsequently without the need to download it again. An option also exists to download all forms in one go so that they will all be available *off-line*.

The Standard forms database is constantly being enhanced and the software will automatically check for newer versions of the database (see Check for New Data).

User Forms
In addition to standard forms, the software allows you to create and maintain your own User Forms. Click on the "User Forms" tab.

Finding the right form is easy and can be accomplished in several ways:

- Click on the list and start typing the form number - the highlighted entry jumps to nearest match as you type

- Click on any of the column headings and the list changes to sorted by that heading - then start typing the beginning of what you are looking for in the column - the highlighted entry jumps to nearest match as you type

- Mark often used forms as Favourites and they are marked with a star . You can then tick the box to limit list to just favourites.

- One of the most powerful methods of finding a form is to use the Search box. Type in anything that you are looking for (form number of part thereof, part of form description, part form category or type) and click *search* button - the list will then just show entries where ANY of the columns contain the search criteria.

- Select a *Type* or *Category* from the drop-down lists to limit list of forms to just those matching the criteria.

System Requirements
Installing the Software

1.1   System Requirements

Minimum System Requirements
- Windows 95*/98*/ME*/NT4*/2000/XP Operating System
- PC capable of running above Windows version
- 256 MB RAM
- 30MB available hard disk space
- Display capable of 800 x 600 resolution (small fonts)
- Windows compatible printer
- Internet connection
- * These older products are no longer fully supported by Microsoft. Whilst the software may run on these operating systems, we cannot make any guarantees.

Recommended System Requirements
- Windows 2000/XP or later Operating System
- PC with Pentium 4, 2.4GHz processor

- 512MB RAM
- 40 MB available hard disk space (ultimate requirement dependant on quantity of information entered)
- Display capable of 1024 x 768 resolution
- Windows compatible laser printer capable of 600 dpi resolution
- Broadband Internet connection

Additionally, the program needs to be able to create small temporary files, from time to time, in your Windows "TEMP" folder.

1.2   Installing the Software

Before Installing the software
Having other programs open during the installation can cause problems, so please ensure that all programs are closed before you start. If you are updating a previously installed copy of the software that has been installed on a network then you must ensure that all users of Forms Online on all workstations have exited before you proceed.

If updating from a previous version of the software it is vital that you take a backup of your data files before you proceed.

You may be installing the software having obtained a copy in a number of ways:
Manual Download from the Internet
If you have manually downloaded the install program from the Internet then launch the installer by double-clicking the icon of the downloaded file.

Automatic Download from the Internet from within old version of the software
If the software has detected that a new version is available to download, it will automatically download the installer to the \updates sub-folder of your existing program data folder and then run the installer program.

Installing from CD
Select the relevant option to run the installer program.

The Installer Program
Once the installer program is running you will be asked to:
- Agree to the terms of the license agreement
- Select the type of installation (New/update, Workstation Shortcuts Only, Custom)
  New or update to current version - Installs the full package on either a stand-alone PC or to a "Mapped" network drive (see network installation below) - Select this option for either a new installation or when upgrading to a newer version.
  Workstation Shortcuts - Installs the full package on either a stand-alone PC or to a "Mapped" network drive - Select this option for either a new installation or when upgrading to a newer version.
  Custom - Allows you to select the individual components.
- Select Install Folder - the installer will install the program software to the folder specified by you. It will show the default folder and to install to a different folder, either type in the new path or click Browse. If the folder entered does not already exist, it will be created automatically. If you are updating from a previously installed version of the software, you must specify the same location as it is already installed.
- Select Data Folder - the installer will create a shortcut that allows the software to access its data in the folder specified. It will show the default folder and to access data in a different folder, either type in the new path or click Browse. If the folder entered does not already exist, it will be created automatically. **Normally you should specify the same folder for data as for the program files.**
- Copy Data Files - if updating from a previous version, you will be prompted as to whether you wish the installer to make a backup copy of the existing data files. This is an added precaution but is not a substitute for your own external data backup which you should have taken prior to proceeding with the installation.

- Specify the Shortcut Folder - the installer will add shortcut icons to the folder indicated below. If you do not want to use the default folder, you can either type a new name, or select an existing folder from the list.
- Check for updates when program starts - Only select this option if you have a permanent Internet connection (eg. LAN access, ADSL or Cable).

The installer will then install/update the software and then, if necessary, convert any existing data to be compatible with the latest version.

Network Installation
The Forms Online software is supplied Network Ready, as standard. The software will run on any Windows compatible network, either a Local Area Network (LAN) or a Wide Area Network (WAN).

To run the software on a network:

Install software and data onto network file server
1. Ensure that you have full disk access privileges on the network drive onto which the software is to be installed.

2. From a PC connected to the network, Map the network drive to a drive letter (eg. N).

3. Run the Setup program on the program disk and substitute the above drive letter of the network drive for the default of C for both the program folder and the data folder locations.

If all has gone smoothly, you should now have installed the software and the data on the file server and created shortcuts to run the program on the PC from which the installation was carried out.

Create Icons/Shortcuts on other Workstations
1. Ensure that you have full disk access privileges on the network directory onto which the software has been installed.

2. If not already done on each Workstations PC, Map the network drive on which the software is installed to a drive letter (eg. N).

3. Create a Windows Shortcut to run the program (eg. Sharereg.exe) with the folder that the exe file is located in as the "Target" folder. The "Target" folder is where the program will look for the data files.

NB.
- All files (program and data) are usually contained in the one folder.
- As an alternative to manually creating a shortcut, you can run the installer and select *Workstation Shortcuts.*
- If your network is slow (eg. Wide Area Network) you may wish to install the programs on the local hard disk and access only the data over the network - in this case, do not manually create shortcuts on the workstation, but, for each workstation, run the installer and specify a local folder for the programs and specify the mapped network folder where the data is located.

2   Introduction

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for newer versions of the database (see Check for New Data).

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Finding the right form is easy and can be accomplished in several ways:

· Click on the list and start typing the form number - the highlighted entry jumps to nearest match as you type

· Click on any of the column headings and the list changes to sorted by that heading - then start typing the beginning of what you are looking for in the column - the highlighted entry jumps to nearest match as you type

· Mark often used forms as Favourites and they are marked with a star ⭐. You can then tick the box to limit list to just favourites.

· One of the most powerful methods of finding a form is to use the Search box. Type in anything that you are looking for (form number of part thereof, part of form description, part form category or type) and click *search* button - the list will then just show entries where ANY of the columns contain the search criteria.

· Select a *Type* or *Category* from the drop-down lists to limit list of forms to just those matching the criteria.

3 Standard Forms

Clicking on the "Standard Forms" tab will display a list of standard forms.

To find the required form, either:
· Scroll up and down the list using the mouse and/or arrow keys.
· Type characters/words to search for in the "Search for" box and then click the search button.
· Select a form "Type" from the drop-down list.
· Select a form "Category" from the drop-down list.

The list can be restricted to just those entries marked as a "favourite" by ticking the "Show only Favourites" box.

To open a form once found, either:

- Double-click the entry

  If working On-line - the form will be downloaded from the Internet to a local file and then immediately opened using the default software for the particular file type.

  If working Off-line - if a local copy of the form exists (from a previous download), the local file will be immediately opened using the default software for the particular file type. If a local copy does not exist, the entry will be "greyed out" and unavailable.

- Highlight the entry and click "Download/Open" from the "Actions" task panel - the form will be downloaded from the Internet to a local file and then immediately opened using the default software for the particular file type. *If working off-line, this option will not be available.*

- Highlight the entry and click "Open local copy" from the "Actions" task panel - the local file will be immediately opened using the default software for the particular file type. If a local copy does not exist, the entry will be "greyed out" and unavailable. *If no local copy exists, this option will not be available.*

NB. Most forms are in "PDF" format and will therefore be opened in you default PDF reader - eg. Adobe Acrobat Reader.

See also:
Download All
Check for Updates
Download All
Overide URL

4   User Forms

In addition to standard forms, the software allows you to create and maintain your own forms. Click on the "User Forms" tab.

Finding the right form is easy and can be accomplished in the same way as for Standard Forms.

To insert a new User Form:
- Click the "New" button

- Complete the above screen (all fields in blue are compulsory).
- Click OK button to save the entry

Once a user form entry has been set up, it can be used in just the same way as a "Standard" form.

NB. If the form relates to a download from the Internet, you will be given the option of automatically sending us an email containing the details of the new entry so that it can be considered for adding to the database of standard forms. An email will be placed in your default email software outbox.

To edit an existing User Form:
- Highlight the required entry
- Click the "Edit" button
- Edit the details as required
- Click OK button to save the entry

To delete an existing User Form:
- Highlight the required entry
- Click the "Delete" button
- Confirm that you wish to delete the entry

5   Favourites

Often used forms can be marked as Favourites, in which case they are marked with a star 🌟.

To mark an entry as a favourite:
- Highlight the required entry
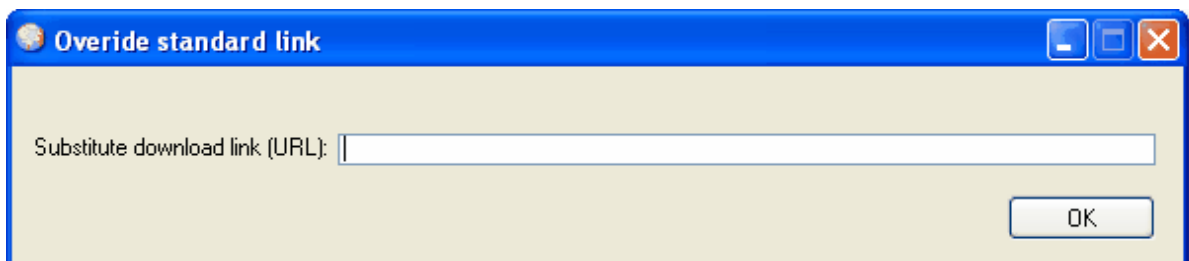- Click the "Add favourite" entry in the "Actions" task panel

To remove an entry as a favourite:
- Highlight the required entry
- Click the "Remove favourite" entry in the "Actions" task panel

6   Overide URL

If you wish to override the default URL link for a standard form:
- Highlight the required entry
- Click the "Override URL" entry in the "Actions" task panel

- Enter the new URL in the above box
- Click OK button to save

Once overridden, the entry will be displayed in orange. To return the entry to the default URL, simply

edit the override URL making it blank. You will be given the option of automatically sending us an email containing the details of the override so that it can be considered for amending the database of standard forms. An email will be placed in your default email software outbox.

7   Download All

It is possible to download all of the standard or user forms in one automatic operation.
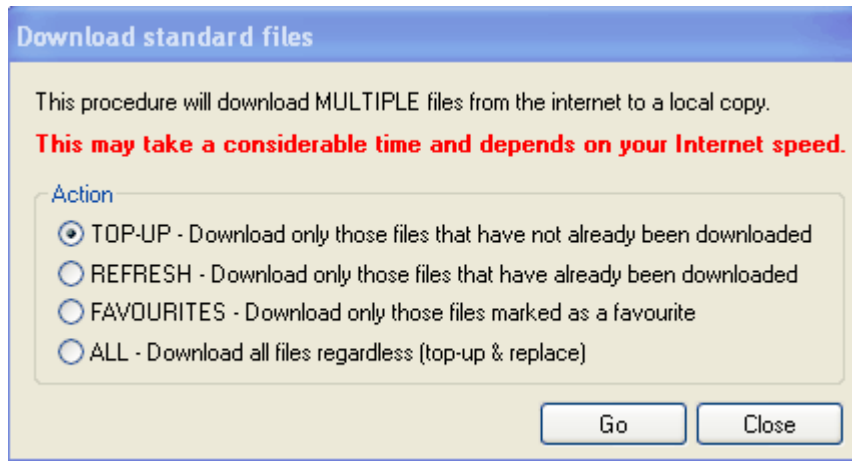
Simply click on the "Download ALL Forms" entry in the "Actions" task panel. You will be prompted as to whether you wish to Top-up, Refresh, Favourites or All.

A considerable amount of data will potentially be downloaded and this may take some time (dependant upon the speed of your Internet connection). The operation can be cancelled at any time.

8   Check for New Data

The database of standard forms is constantly being enhanced and updated so it is important that your software includes the latest version.

 The date of your version is displayed on the panel at the foot of the window.

Each time the software is opened, it will attempt to connect to the Internet and check to see if a newer version of the database is available - if a newer version is found, you will be asked if you wish to download it. If you agree, it will be downloaded and installed. This operation is relatively fast.

Alternatively, you can manually check for new data at any time by clicking on the "Check for new data" entry in the "Actions" task panel.

9   Working on and off-line

By default, the software will connect to the Internet whenever needed in order to check for new forms data and to download forms.
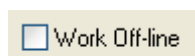
 If you would like to work off-line, simply tick the box.

Whilst working off-line:
- Automatic checks for new forms data will not take place
- You will not have the option of manually checking for new data
- You will not be able to "Download All" forms

- You will only be able to open forms that have previously been downloaded and where a "local" copy exists.

Any entries without a "local" copy will be shown in grey and will be unavailable.

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