DESIGNER QUICKSTART TUTORIALS

Contents

Chapter 1: About the Quick Start Tutorials

The Quick Start tutorials are designed to get you started with Designer.

Creating a purchase order form

This tutorial takes you through the process of creating an interactive purchase order form that includes a Print Form button. When the person filling the form clicks this button, the form is printed. The person then returns the printed form to you. In addition to adding objects, you will learn how to add simple calculations. See "Creating a purchase order form" on page 2.

Creating a purchase order form that has a flowable layout

This tutorial takes you through the process of changing a form's fixed layout to a flowable layout, sometimes called a dynamic layout. By using subforms, that the form displays all the orders that one of your clients requested. This tutorial also shows you how to merge a form with data. See "Creating a purchase order form that has a flowable layout" on page 23.

Chapter 2: Creating a purchase order form

In this tutorial, you use Designer to create an interactive purchase order form that includes a Print Form button.

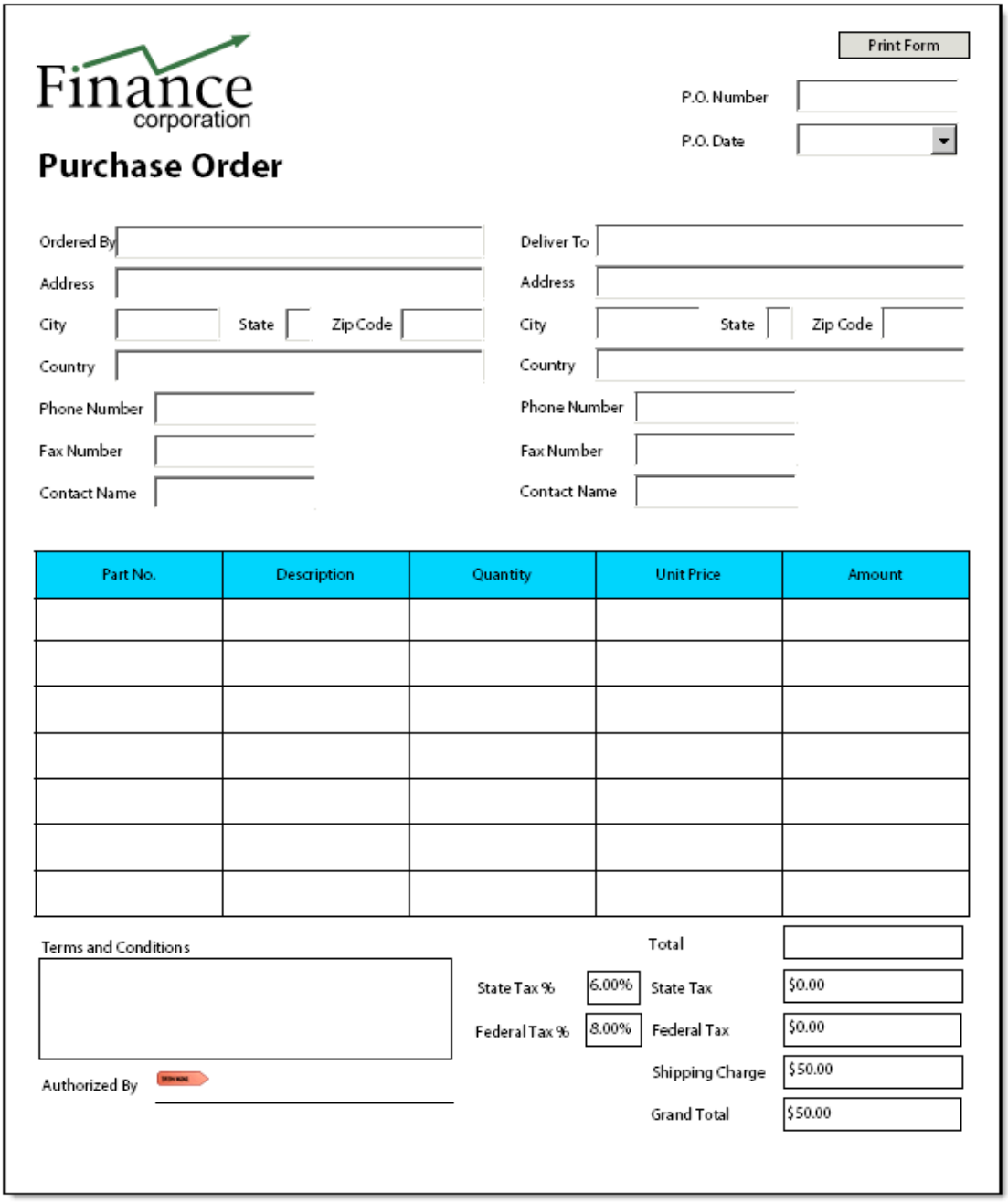
When the person filling the form clicks this button, the form is printed. The person then returns the printed form to you. In addition to basic concepts, you will learn how to add simple calculations. No matter what type of form you create later, you will find this tutorial a useful introduction.

About creating a purchase order form

During the course of a workday, you may deal with many different types of forms, such as order forms, invoices, paychecks, and time sheets:

- Forms you fill directly, either by hand or electronically.
- Forms you fill in conjunction with a server-based process that merges the form with data.
- Forms are a combination of both.

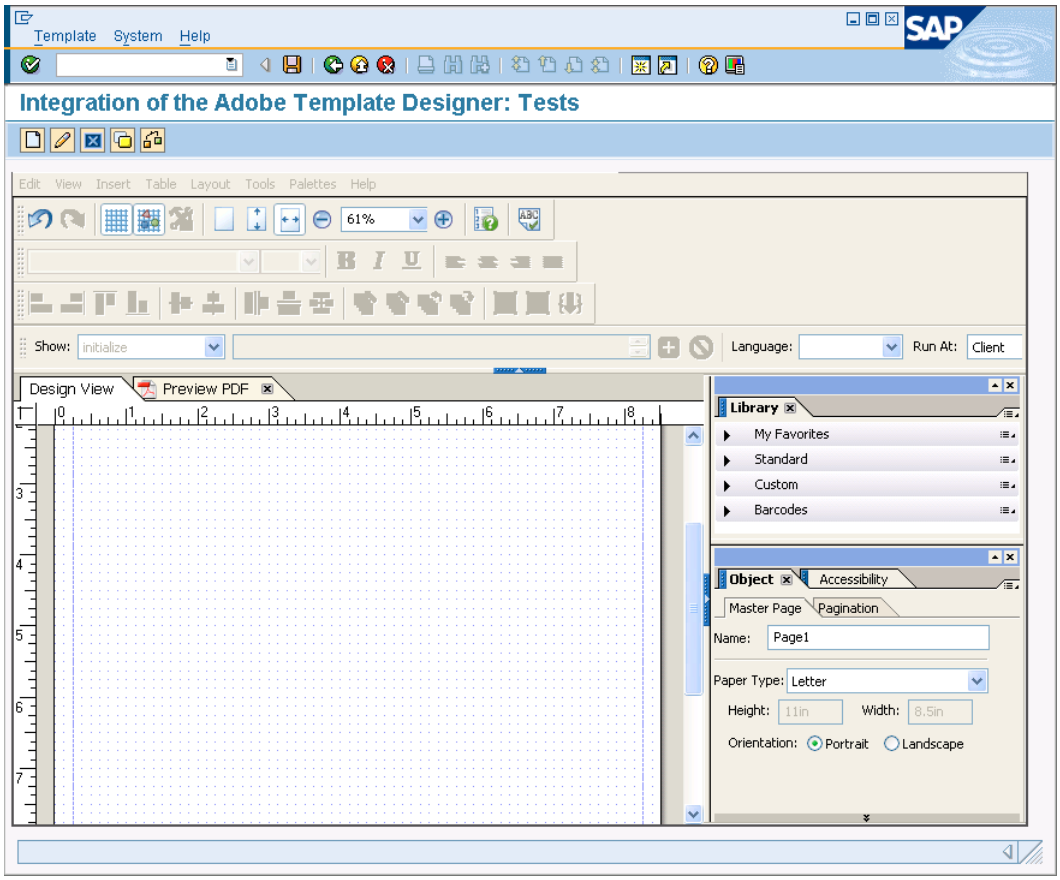
When you have completed this tutorial, the form you create will look like this purchase order.



Click to continue:"Starting the form design" on page 4

Starting the form design

You create a form design in the Designer workspace.



- To add a Print button, in the Object Library palette, click the Standard category and then drag the Print Button object OK onto the form in the upper right corner.

Click to continue: "Adding a logo" on page 5

Adding a logo

In this section, you will add a logo to the purchase order.

1 In the Object Library palette, click the Standard category and then drag the Image object onto the form design in the upper left corner.

   Note: *If you are using Designer in ABAP Workbench or SAP NetWeaver Developer Studio, locate an image you can use as a logo.*

2 In the Object palette, select Use Original Size from the Sizing list.

Click to continue: "Adding the purchase order title" on page 5

Adding the purchase order title

In this section, you will add a title to the purchase order.

1 In the Object Library palette, click the Standard category and then drag the Text object below the logo.

2 Select the text in the Text object and type `Purchase Order`.

3 Select the text in the Text object and, in the Font palette, select 20 from the Size list, and Bold from the Style list.

   You can set the default font for objects. For example, if you want to set the default font for all Text objects to Arial, insert a text object in your form, change the font to Arial, and then drag the Text object into the Standard category of the Object Library palette. In the Add Library Object dialog box, type `Text` *and click OK. Designer asks you to confirm that you want to replace the existing Text object. Click Yes.*

Click to continue: "Adding a text field for the P.O. Number" on page 6

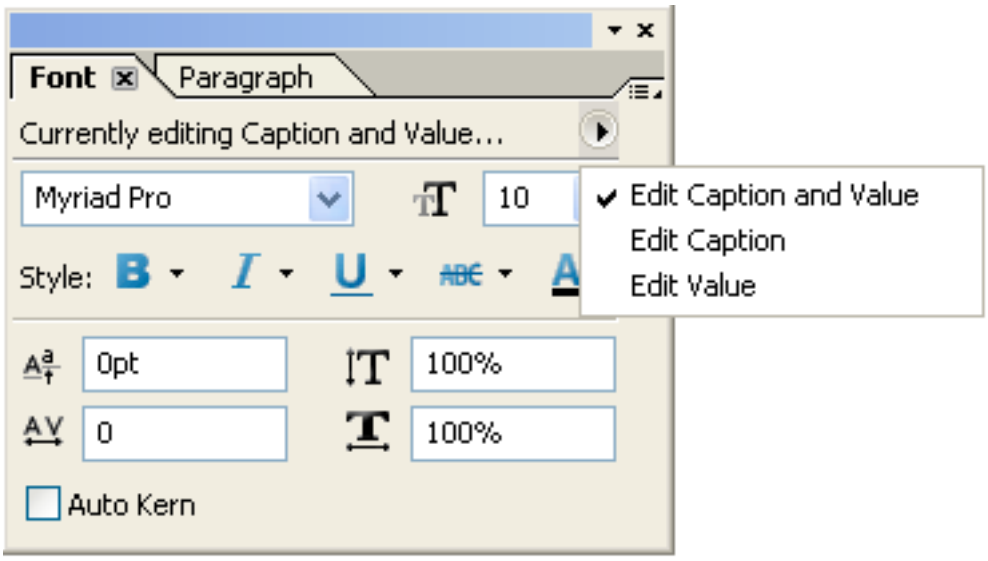
Adding a text field for the P.O. Number

Next, you need to use a text field for the P.O. Number. In this form, it consists of 10 numbers.

1 In the Object Library palette, click the Standard category and then drag the Text Field object onto the form in the upper right corner.

2 Select the text in the Text Field object and type `P.O. Number`.

After the Text Field is selected, you can change the font, font size, and style of both the caption and the value. The caption (the field's label) is beside the value (where the person filling the form enters the data). In the Font palette, use the palette menu to change the fonts for the caption and value.



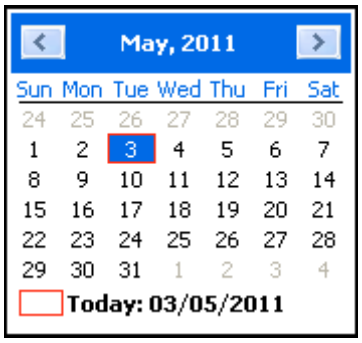
Next, you must set the field length to 10 numbers.

3 In the Object palette, click the Field tab and select the Limit Length option. Type `10` in the Max Chars box.

Click to continue: "Adding a date field for P.O. Date" on page 7

Adding a date field for P.O. Date

You can use the Date Field object to make it easy for your users to pick a date. This calendar is what users see in the form when they click the drop-down list for P.O. Date when viewing the form in Adobe® Acrobat®.



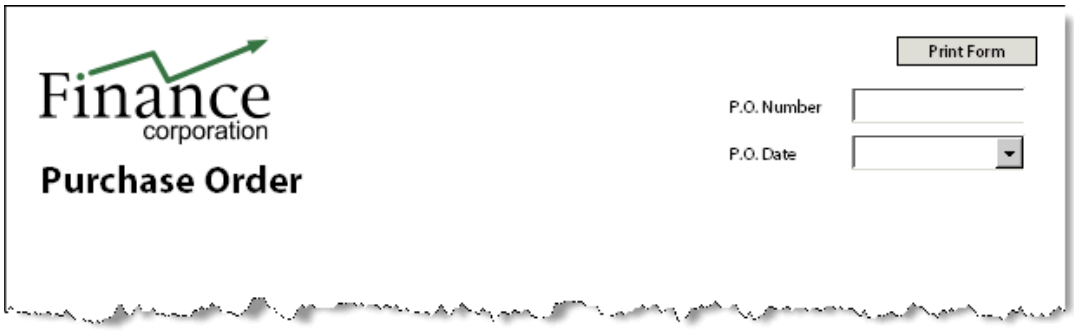
1 In the Object Library palette, click the Standard category and then drag the Date Field object onto the form under the P.O. Number.

2 Select the text in the Date Field object and type `P.O. Date`.

Click to continue: "Previewing your work" on page 7

Previewing your work

As you work, you can preview your form design to see how it will look to the form filler. For example, here is how your form should look now.



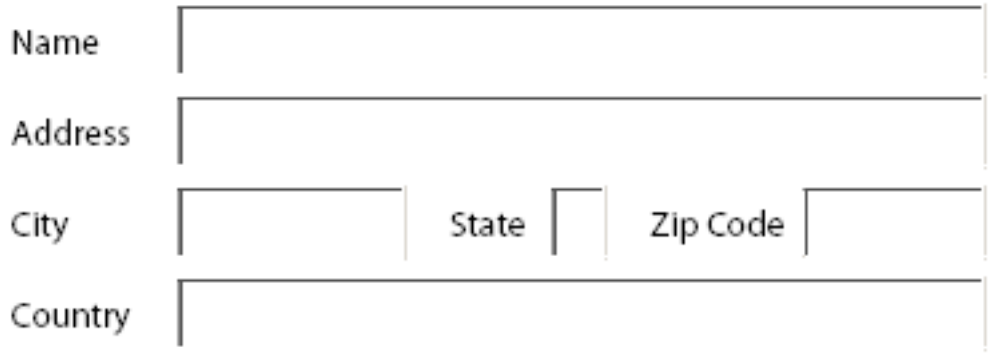
1 Click the Preview PDF tab.

2 Click the Design View tab to continue editing the form design.

Click to continue: "Adding an address block" on page 8

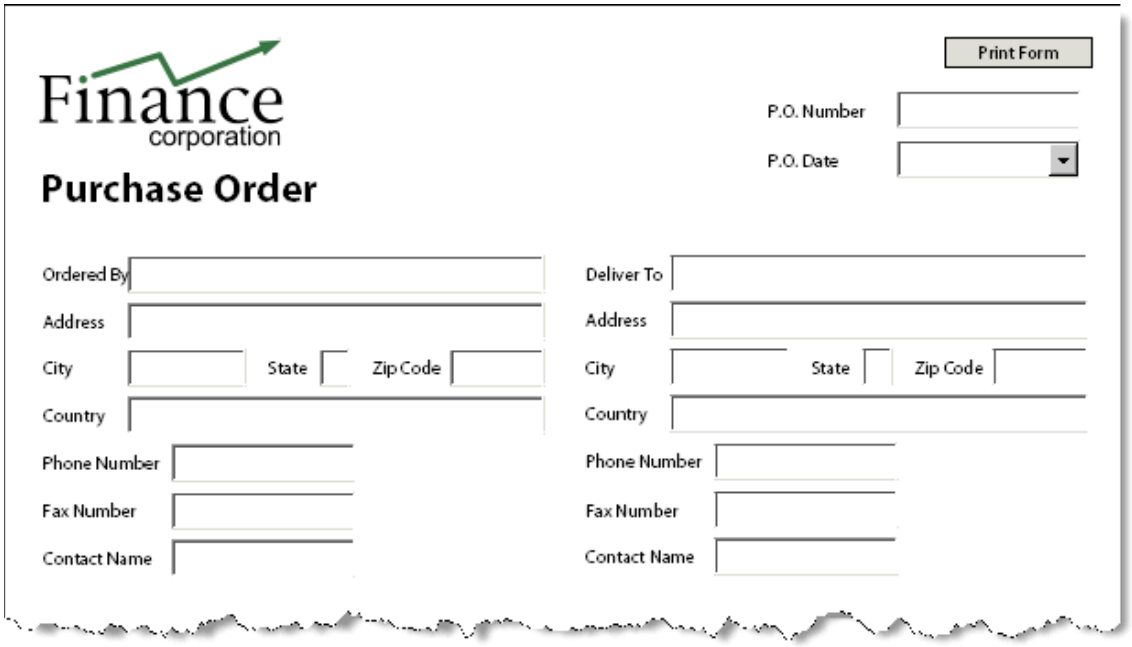
Adding an address block

Designer includes some predefined custom objects that you can use to quickly create forms. For example, in this tutorial, we will use the Address Block custom library object to insert several fields at once.



1. In the Object Library palette, click the Custom category and then drag the Address Block field object onto the form under the Purchase Order title.
2. Rename the Name text field to `Ordered By`.
3. In the Object Library palette, click the Standard category and then drag the Text Field object onto the form under the Country field.
4. Name the Text Field object `Phone Number`.
5. Add another Text Field object for `Fax Number`.
6. Add another Text Field object onto the form under the fax number.
7. Name the Text Field object `Contact Name`.
8. To be able to insert a second address block beside this one, drag to select all the fields created in steps 1 to 7 and reduce the width of them by about half an inch using the sizing handle on the right side.
9. Copy and paste the selected fields next to the Ordered By address block.
10. Rename the second Ordered By field to `Deliver To`.

Your form should look like this now.



You can preview your form with the Preview PDF tab again.

To improve the appearance of the form, you can change the look of the sunken box fields. To do this, select the object, and then in the Object palette, click the Field tab and select Underlined from the Appearance list.

Click to continue: "Adding the purchase order details" on page 9

Adding the purchase order details

Now, you need to add a table that will contain the part numbers, item descriptions, quantities, unit prices, and amounts of each item. Using tables helps you build this section quickly. The table will have five columns.

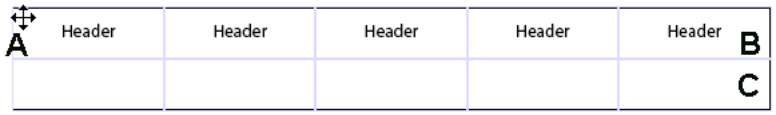
The Table Assistant is an easy way to create a new table if you are new to creating tables in Designer.

1. Select Table > Insert Table.
2. Select the Create Table Using Assistant option and click OK.
3. Under Body Has Fixed Dimensions, type 5 for the number of columns and 1 for the number of body rows, and then click Next.
4. Select the Has Header Row option and click Next.
5. Ensure the No Footer Row option is selected and click Next.
6. Select the Has Body Rows And No Sections option and click Next.
7. Clear the Alternating Row Colors option and click Finish.

Click to continue: "Moving the purchase order table" on page 10

Moving the purchase order table

Here is the table that you just inserted.



A. *Cursor for moving the whole table* ***B.*** *Header row* ***C.*** *Body row*

Now you need to position the table under the address blocks.

1 If the table is not selected, move the cursor to the upper left corner until you see the following cursor:

2 Click to select the whole table.

Another way to select the whole table is to select a cell, then select Table > Select, and then select Table, or you can click and drag to select.

3 Move the mouse to the upper left corner of the table until the move cursor appears.

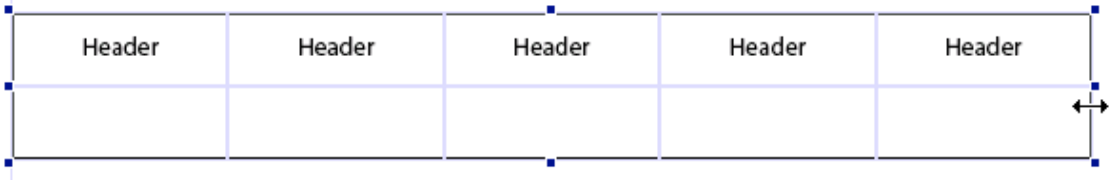
4 Drag the table to the new location.

Click to continue: "Sizing the purchase order table" on page 10

Sizing the purchase order table

You can size the table so that it spans the width of the page. By default, it is centered on the page.

1 Select the table.



2 Move the cursor to the middle handle on the right so that the move cursor appears (shown in the previous step).

3 Drag to make the table fill the width of the page.

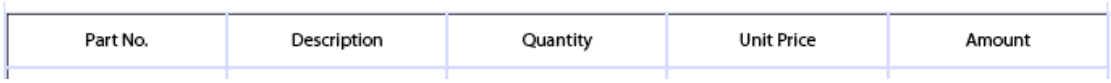
To make the width of all the columns the same, select Table > Distribute Columns Evenly.

Click to continue: "Entering labels in the header row" on page 11

Entering labels in the header row

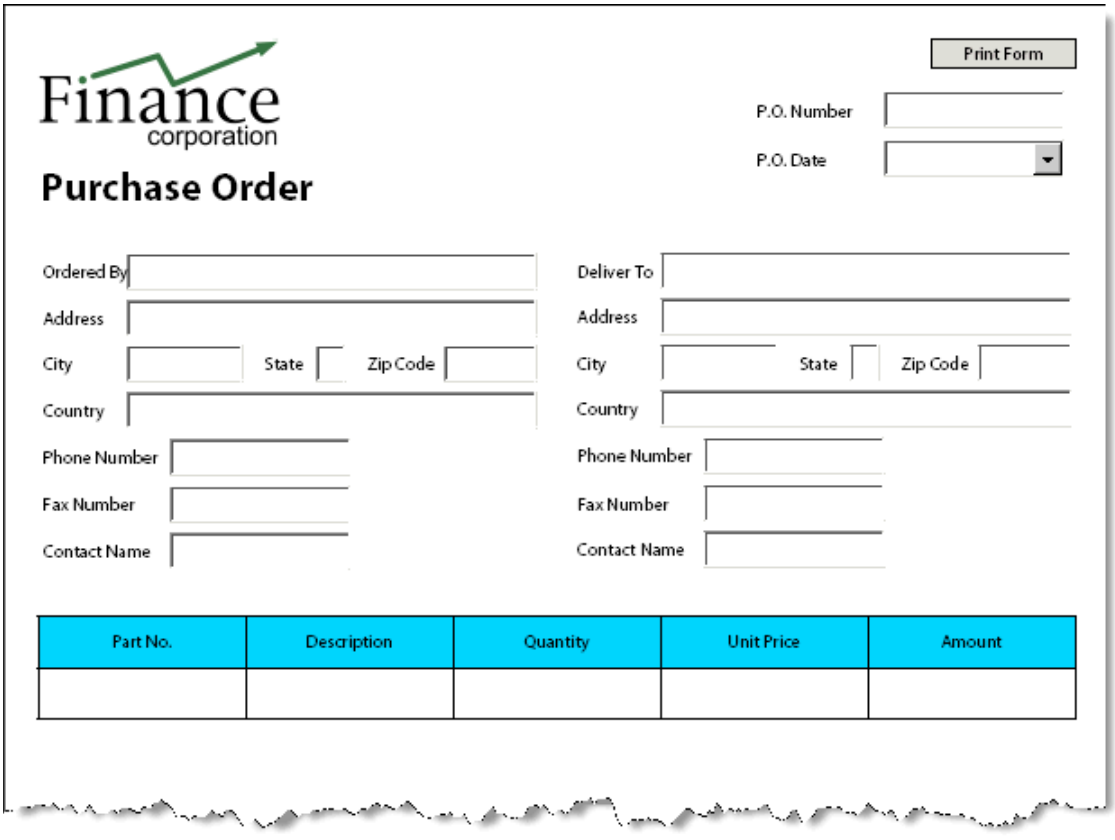
1 Double-click the first cell in the table and type `Part No`.

2 Repeat step 1 for the remaining cells in the header row so that it looks like this.



You can apply a color fill to this row to  *it distinctive. To do this, select the row by moving the cursor to the left of the row until this cursor appears* *. Then, in the Border palette, select Solid from the Background Fill Style list. Finally, choose a color from the Color picker*  *.*

Your form should look like this now.



Click to continue: "Specifying the Part No. and Description cells as text fields" on page 12

Specifying the Part No. and Description cells as text fields

By default, the cells in tables are set as text objects. Now you must set the Description column cell as a text field. Text fields enable users to type, select, edit, cut, copy, paste, and delete any of the text inside the field. (Text objects present read-only text that end users cannot edit.)

1 Select the cell under Part No.

2 In the Object palette, click the Cell tab and in the Type list select Text Field.

3 From the Appearance list, select None.

4 Select the Allow Multiple Lines option.

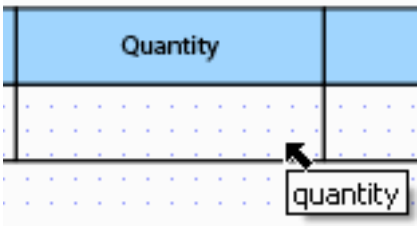
5 Repeat steps 1 to 4 for the Description cell.

Click to continue: "Changing the cells to numeric fields" on page 12

Changing the cells to numeric fields

Now you must set Quantity, Unit Price, and Amount as numeric fields.

1 Select the first cell under Quantity.



2 In the Object palette, click the Cell tab and select Numeric Field in the Type list.

3 In the Cell tab, select None from the Appearance list.

4 Repeat steps 1 to 3 for Unit Price and Amount.

5 The Unit Price and Amount fields show currency. To format the data to show numbers as currency, drag to select the cells in the Unit Price and Amount columns. Then in the Object palette, click the Cell tab, click the Patterns button, and in the Pattern box, type `$z,zz9.99`.

6 Click OK.

Click to continue: "Naming the fields" on page 12

Naming the fields

To make your form more readable and usable, and to be able to perform calculations, it is a good idea to rename the fields. If you want to perform calculations, you will need to know the exact name of the field.

Note: *Designer is case-sensitive.*

1 Select the cell under Part No.

2 In the Object palette, click the Binding tab and type `partNo` in the Name box.

3 Repeat steps 1 and 2 for the remaining columns and name them as follows:

- `description`
- `quantity`
- `unitPrice`
- `amount`

Click to continue: "Performing a calculation in the Amount column" on page 13

Performing a calculation in the Amount column

The Amount column must show the number of items ordered multiplied by the unit price. You perform calculations in Designer using FormCalc or JavaScript. We will use FormCalc for this calculation. FormCalc is a simple yet powerful calculation language modeled on common spreadsheet software. Its purpose is to facilitate fast and efficient form design without requiring a knowledge of traditional scripting techniques or languages. You use the Script Editor to enter calculations for the different objects on the form.

1 If the Script Editor is not already showing, select Palette > Script Editor.

2 If you want, drag the Script Editor palette bar until the palette is larger.

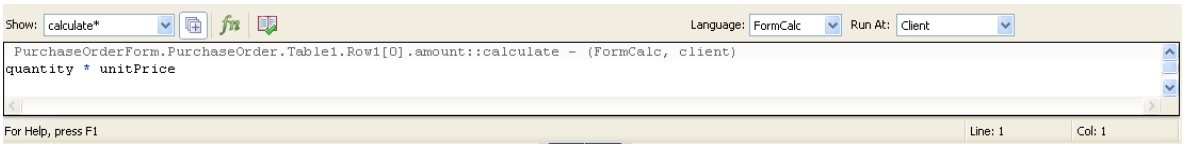
3 Select the cell under Amount.

4 Select Calculate from the Show list.

5 Select FormCalc from the Language list and Client from the Run At list.

6 In the Script Source field, type the following calculation:

```
quantity * unitPrice
```



7 Deselect the cell to add the script to your form.

8 To set this column as read-only, select the cell again, then in the Object palette, click the Value tab and select Calculated - Read Only from the Type list.

Click to continue: "Adding rows to the purchase order table" on page 14

Adding rows to the purchase order table

For this form, you need seven rows in which users can enter the items they want to purchase. A quick way to add several rows at once is to use the Copy Multiple command.

1 Drag to select the body row.

2 Select Edit > Copy Multiple.

3 In the Number of Copies box, type 6.

4 Select the Place Below option.

5 Ensure the Touching option is selected in the Vertical Spacing box.

Your form should look like this now:

Click to continue: "Renaming the contents of your form" on page 15

Renaming the contents of your form

It is a good idea to rename the objects in your form to organize it and identify the different areas of the form. To do this, the easiest way is to use the Hierarchy palette. The Hierarchy is a graphical representation of the contents of your form.

1. Select Palette > Hierarchy.
2. Select the first object in the hierarchy, *form1*.
3. Press F2 or right-click and select Rename Object.
4. Type the new name, `PurchaseOrderForm`.
5. Rename *(untitled Subform) (page 1)* to `PurchaseOrder`.

You can rename the rest of the contents of your form, if you want, but it is not necessary to complete this tutorial.

You can also move objects around in the Hierarchy by selecting them and dragging them up or down.

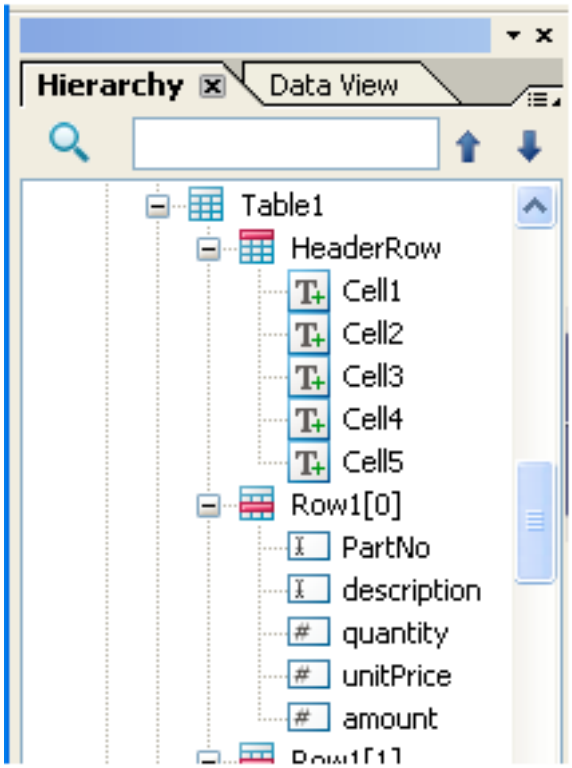
Click to continue: "Inserting the subtotal at the bottom of the table" on page 15

Inserting the subtotal at the bottom of the table

To perform calculations, FormCalc needs to know what object to use in the calculation. In this step, we want to find out the total of all the data in the Amount column. If you select a cell in the Amount column, you can see the internal name in the Script Editor (if you resize the Script Editor to be larger).

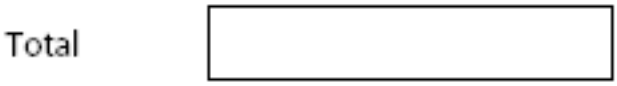
What you see in the internal name relates to what you see in the hierarchy. "PurchaseOrderForm" is at the top, followed by "PurchaseOrder", and so on.

All the rows in the table are named "Row1" followed by a default instance number. To be able to add the data in one column, all the rows have to be named the same.




```
----- PurchaseOrderForm.PurchaseOrder.Table1.Row1[0].amount
```

Now, you will add the calculation for the subtotal at the bottom of the table.



1. In the Object Library palette, click the Standard category and then drag the Numeric Field object onto the form below the table under the Amount column.
2. Select the caption text in the Numeric Field object and type `Total`.
3. In the Object palette, click the Field tab and select Solid Box form the Appearance list.
4. In the Script Editor, select Calculate from the Show list.
5. Select FormCalc from the Language list and Client from the Run At list.
6. In the Script Source field, type the following calculation:

   ```
   sum(Table1.Row1[*].amount[*])
   ```

   The wildcard character (*) tells Designer to collect all the data in the rows labeled *Row1* and all the data in the Amount column.
7. Deselect the Numeric Field object to add the script to your form, then select it again.

8 In the Object palette, click the Binding tab and type `total` in the Name box.

9 Click the Field tab, click the Patterns button, and in the Pattern box, type `$z,zz9.99`.

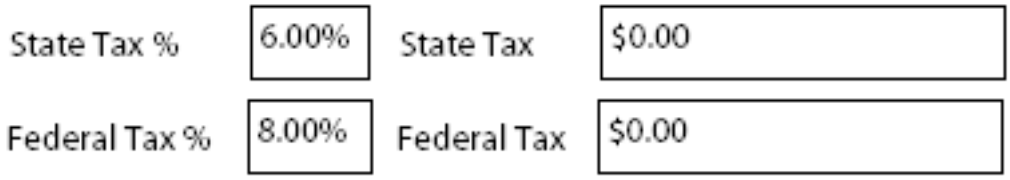
10 Click OK.

11 Click the Value tab and in the Type list, select Calculated - Read Only.

Click to continue: "Inserting the Tax fields" on page 17

Inserting the Tax fields

The purchase order needs to calculate the appropriate state and federal taxes. To do this, you create a field that shows the tax rate and a calculated field that shows the tax amount.



To insert the State Tax % field

1 In the Object Library palette, click the Standard category and then drag the Numeric Field object # onto the form below the Total field.

2 Select the caption text in the Numeric Field object and type `State Tax %`.

You may want to resize the field to make it smaller.

3 In the Object palette, click the Field tab and select Solid Box in the Appearance list.

4 Click the Patterns button and in the Pattern box, type `z9.99%`.

5 Click the Binding tab and type `stateTaxPercent` in the Name box.

6 Click the Value tab and in the Default box, type `6` .

To insert the State Tax field

1 Copy the State Tax % field and position the new field beside the State Tax % field.

2 Select the text and type `State Tax`.

3 In the Script Editor, select Calculate from the Show list.

4 Select FormCalc from the Language list and Client from the Run At list.

5 In the Script Source field, type the following calculation:

```
(total * stateTaxPercent / 100)
```

6 Deselect the Numeric Field object to add the script to your form, then select it again.

7 In the Object palette, click the Binding tab and type `stateTax` in the Name box.

8 Click the Field tab, click the Patterns button and in the Pattern box, type `$z,zz9.99`.

9 Click the Value tab and in the Type list, select Calculated - Read Only.

To insert the Federal Tax % and Federal Tax fields

1 Repeat the procedure for inserting the State Tax % field.

2 Repeat the procedure for inserting the State Tax field.

3 Ensure the following changes to make the fields applicable for Federal Tax:

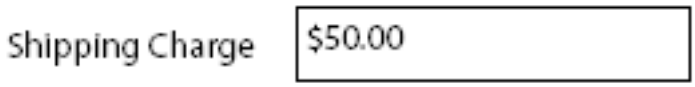
- Change all instances of the word *state* to *federal*.
- Set the default value for the federal tax percent to 8.
- Set the calculation for federalTax to:

```
(total * federalTaxPercent / 100)
```

Click to continue: "Inserting the Shipping Charge field" on page 18

Inserting the Shipping Charge field

By default, a shipping charge of $50.00 applies. However, this form lets users enter a different shipping charge if required.



1 In the Object Library palette, click the Standard category and then drag the Numeric Field object onto the form below the federal tax field.

2 Select the caption text in the Numeric Field object and type `Shipping Charge`.

3 In the Object palette, click the Binding tab and type `shippingCharge` in the Name box.

4 Click the Field tab and in the Appearance list, select Solid Box.

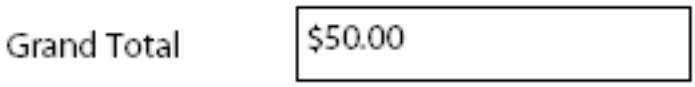
5 Click the Field tab, click the Patterns button and in the Pattern box, type `$z,zz9.99`.

6 Click the Value tab and in the Default box, type `50`.

Click to continue: "Inserting the Grand Total field" on page 18

Inserting the Grand Total field

You now need to add a Grand Total field that shows the total for the items, taxes, and shipping charges.



1 In the Object Library palette, click the Standard category and then drag the Numeric Field object onto the form below the Shipping Charge field.

2 Select the caption text in the Numeric Field object and type `Grand Total`.

3 In the Object palette, click the Binding tab and type `grandTotal` in the Name box.

4 Click the Field tab and in the Appearance list, select Solid Box.

5 Click the Patterns button and in the Pattern box, type `$z,zz9.99`.

6 Click the Value tab and in the Type list, select Calculated - Read Only.

7 In the Script Editor, select Calculate from the Show list.

8 In the Script Source field, type the following calculation:

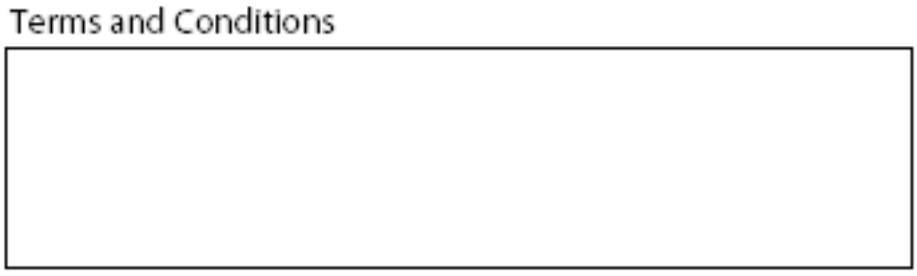
```
sum (total, stateTax, federalTax, shippingCharge)
```

9 Deselect the Numeric Field object to add the script to your form.

Click to continue: "Adding the Terms and Conditions section" on page 19

Adding the Terms and Conditions section

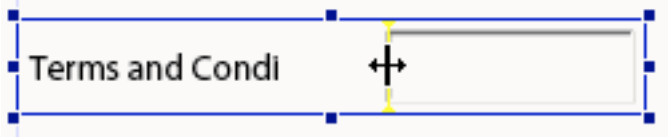
Now you can add the terms and conditions explaining how the items will be paid for.



1 In the Object Library palette, click the Standard category and then drag the Text Field object onto the form under the table beside the calculations.

2 Name it `Terms and Conditions`.

You may have to resize the field so that you can fit the caption. To do this, move the cursor over the left border of the field. Click and drag to resize.



3 In the Object palette, click the Field tab and select the Allow Multiple Lines option.

4 Select Solid Box from the Appearance list.

5 In the Layout palette, select Top from the Caption Position list.

6 Drag to resize the box and make it bigger.

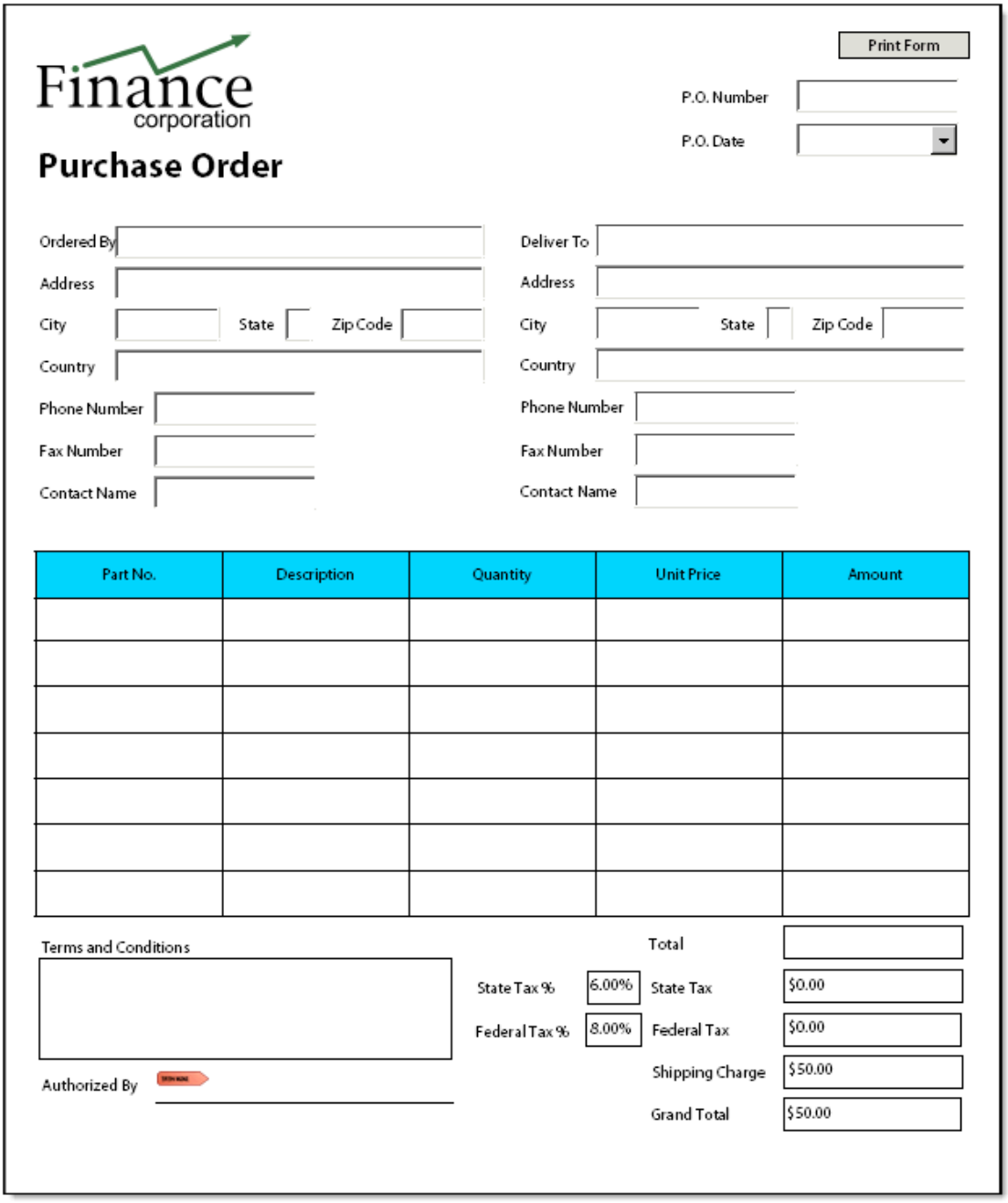
Click to continue: "Adding the Authorized By Signature field object" on page 20

Adding the Authorized By Signature field object

If you want the person filling the form to use the Acrobat Signature feature to sign the document, you add a Signature Field object to the form design.

1. In the Object Library palette, click the Standard category and then drag the Signature Field object onto the form below the Terms and Conditions section.
2. Select the Signature Field object text and type `Authorized By`.
3. In the Object palette, select Underlined from the Appearance list.
4. Drag to resize the field and make it bigger.

Your form should look like this now.



Click to continue: "What's next" on page 22

What's next

This type of form is just one of many types that you can create using Designer.

More Help topics

"Creating a purchase order form that has a flowable layout" on page 23

Chapter 3: Creating a purchase order form that has a flowable layout

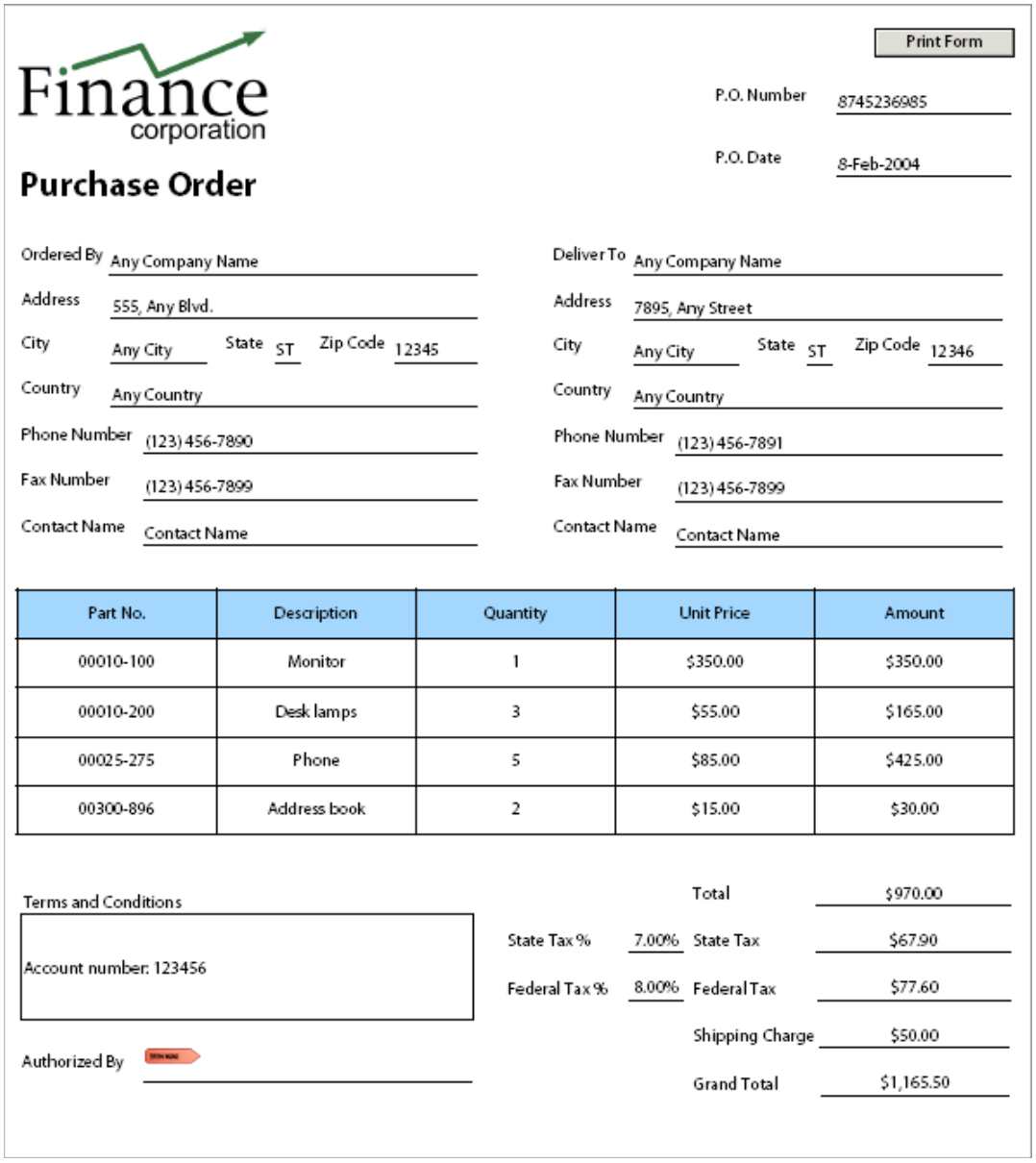
In this tutorial, you learn how to change a form's fixed layout to a flowable layout by using subforms so that the form displays all the orders that one of your clients requested. You will also learn how to merge a form with data.

Start this tutorial with the form created in the Creating a purchase order form tutorial. You will rework the form to have a flowable layout. A flowable layout means that the form will adjust to accommodate data so that it displays all the orders that one of your clients requested.

The form design in this tutorial presents information from a data source. The resulting form is a non-interactive form that you can print or store electronically.

About creating a purchase order form that has a flowable layout

When you finish working through this tutorial, the form you create will look like this purchase order form merged with data.



To complete this tutorial, you need a schema and a data file. You can use those that come with Designer if you have installed the samples. The schema and data file are in the following location, by default:

- \EN\Samples\Forms\Purchase Order\Schema\Schema\Forms\Purchase Order.xsd
- \EN\Samples\Forms\Purchase Order\Schema\Data\Purchase Order.xml

Click to continue: "Opening the purchase order form" on page 25

Opening the purchase order form

To start, you will open the Purchase Order form that you saved in the previous tutorial.

1 Select Tools > Import.

2 Locate the form that you saved in the previous tutorial and click Open.

3 Select Edit > Form Properties and click the Preview tab.

4 In the Preview area, ensure that Dynamic PDF is selected for the Adobe XML preview format and then click OK.

If you are using Designer in ABAP Workbench or SAP NetWeaver Developer Studio, the environment saves the forms and templates when you exit the application.

Click to continue: "Enhancing the format of the form" on page 25

Enhancing the format of the form

To enhance the format of the form for printing, you can make the field objects above the table an underline instead of a sunken box.

1 Select the P.O. Number field.

2 In the Object palette, click the Field tab and, in the Appearance list, select Underlined.

3 Repeat for the remaining field objects above the table.

You can change selected objects of the same type all at once.

4 Select all the field objects above the table, except for the Print Button, Logo, and Purchase Order title.

5 In the Paragraph palette, click Align Bottom.

6 View the form in the Preview PDF tab.

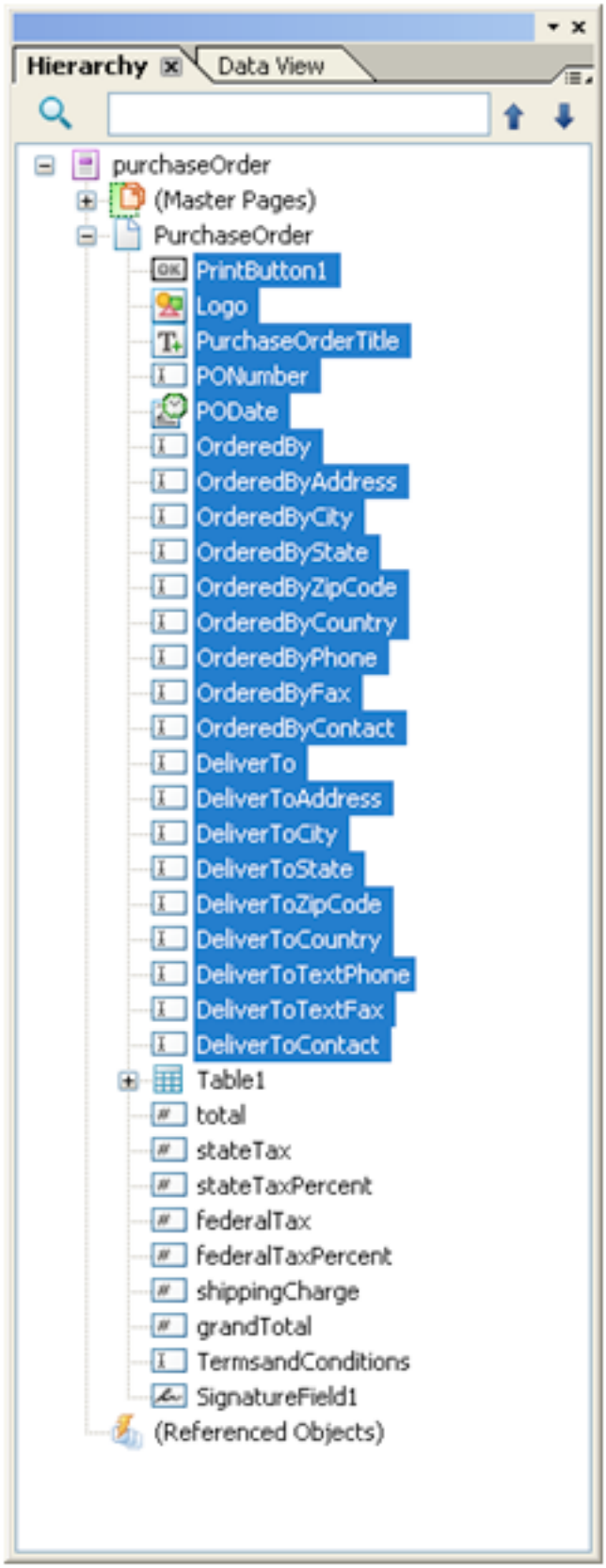
7 Click the Design View tab to continue editing the form design.

Click to continue: "Organizing the form" on page 27

Organizing the form

To create a form that has a flowable layout, you must organize the sections into subforms to merge with data. Subforms are objects that act as containers for other objects, including fields, boilerplate objects, and other subforms. They help to position objects relative to each other and provide structure in form designs that have a flexible layout.

1 In the Hierarchy palette, select all the items that appear above the table.


Hierarchy
Data View
purchaseOrder
(Master Pages)
PurchaseOrder
PrintButton1
Logo
PurchaseOrderTitle
PONumber
PODate
OrderedBy
OrderedByAddress
OrderedByCity
OrderedByState
OrderedByZipCode
OrderedByCountry
OrderedByPhone
OrderedByFax
OrderedByContact
DeliverTo
DeliverToAddress
DeliverToCity
DeliverToState
DeliverToZipCode
DeliverToCountry
DeliverToTextPhone
DeliverToTextFax
DeliverToContact
Table1
total
stateTax
stateTaxPercent
federalTax
federalTaxPercent
shippingCharge
grandTotal
TermsandConditions
SignatureField1
(Referenced Objects)

2 Select Insert > Wrap in Subform.

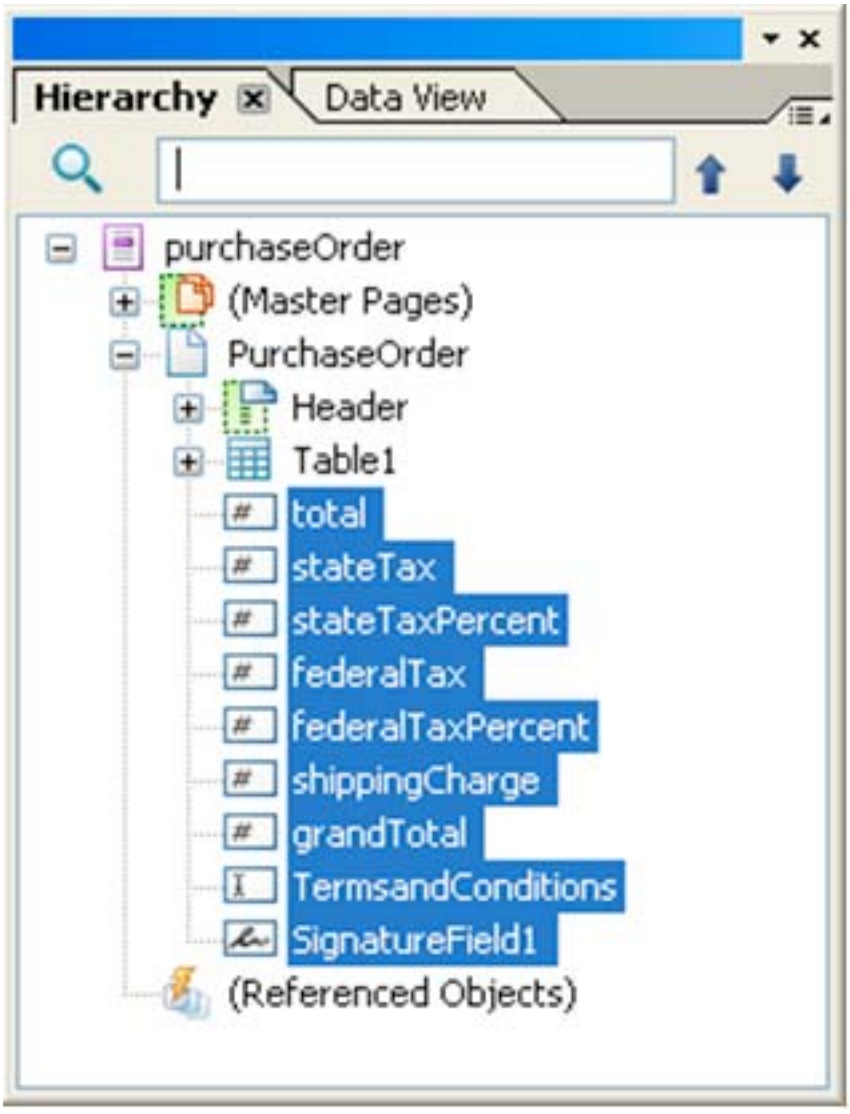
3 Select the (untitled Subform), right-click, and select Rename Object.

4 Type `Header` and press Enter.

5 To ensure that the Header subform has space above it, make sure that the Layout palette is displayed and, in the Height box under Size & Position, type `4.5in`.

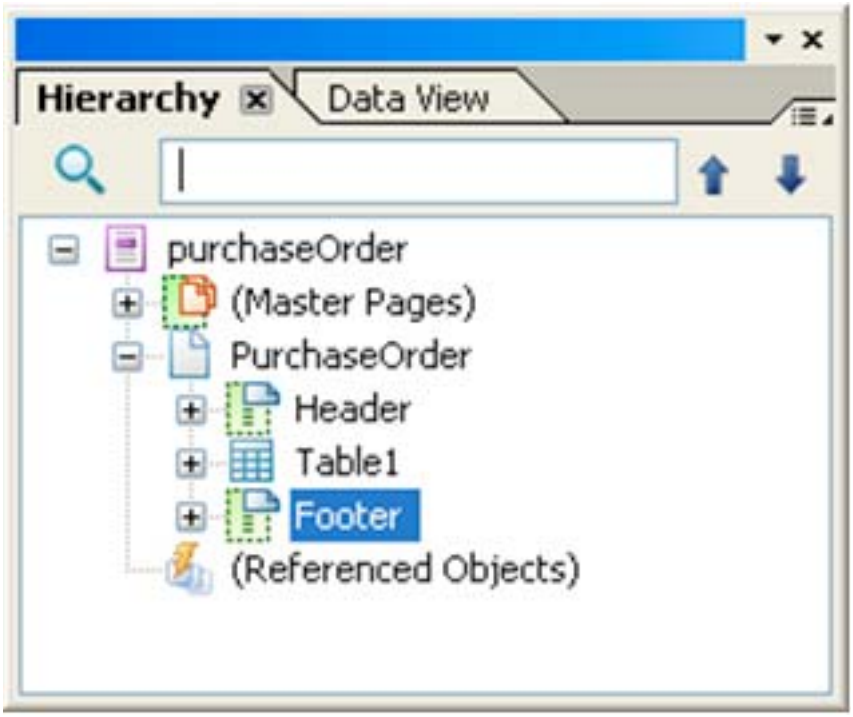
6 Collapse all the items in the hierarchy.

7 Repeat steps 1 and 2 for all the items below the table (total to SignatureField1) and rename this new (untitled Subform) `Footer`.



8 To ensure that there is space before the Footer subform, make sure that the Layout palette is displayed and, in the Top box under Margins, type `0.25in`.

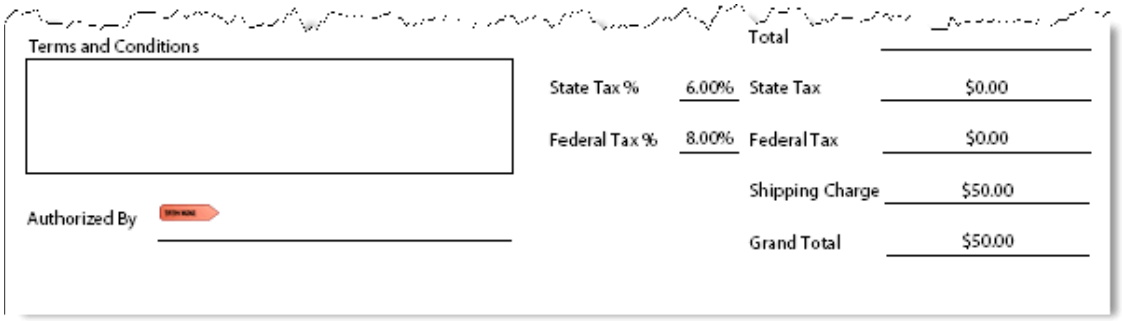
This is what you should see in the Hierarchy palette if you collapse everything under PurchaseOrder.



Click to continue: "Formatting the footer" on page 30

Formatting the footer

To enhance the format of the footer, you can make the fields below the table show an underline instead of a sunken box. You can also set the captions and values to be bottom-aligned and set just the values in the fields to be center-aligned.



1 Drag to select the fields in the footer, except for the Terms and Conditions and the Authorized By fields.

If you try to drag to select the fields and you have the Move pointer, click anywhere along the edge of the form design to change the pointer to an arrowhead shape.

2 In the Object palette, click the Field tab and, in the Appearance list, select Underlined.

3 In the Paragraph palette, click Align Bottom.

4 In the Currently Editing palette, select Edit Value to change the paragraph alignment of just the value.

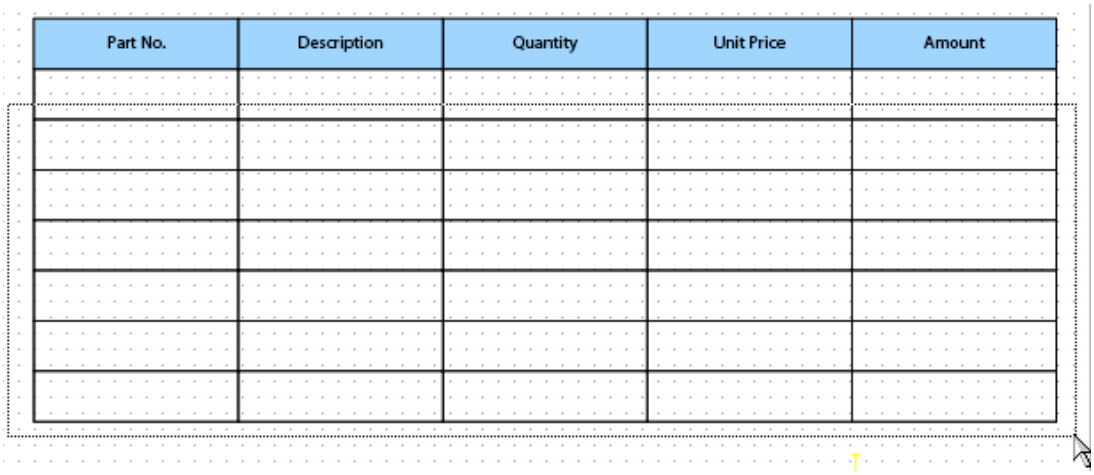
5 Click Align Center.

Click to continue: "Setting the table to dynamically grow" on page 31

Setting the table to dynamically grow

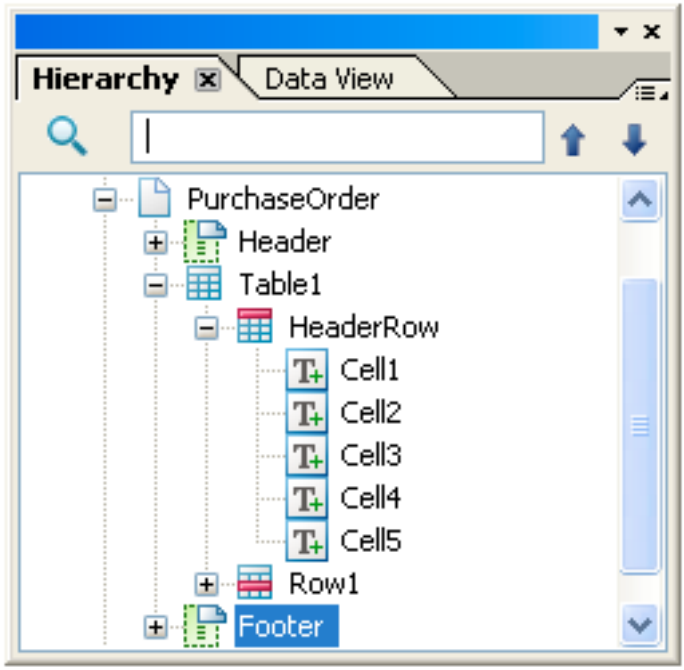
In a form that has a flowable layout, you may not know how much data the data source contains; therefore, you cannot specify how many rows the table should have. You have to set the table to be dynamic. To do this, you include only one body row that is set to repeat, depending on how much data there is in the data source.

1 Drag to select the rows that are below the first row.



2 Select Table > Delete > Row.

3 In the Hierarchy palette, select Table1.



4 Select Insert > Wrap in Subform.

This action creates a section in the form that contains the table. You need to separate this section from the remainder of the form to make it dynamically grow to fit the data.

5 With the (untitled Subform) selected in the Hierarchy palette, in the Object palette, click the Subform tab and, in the Content list, select Flowed.

6 Rename the (untitled Subform) to `Table`.

7 In the Hierarchy palette, select HeaderRow.

8 In the Object palette, click the Binding tab and select Repeat Row For Each Data Item.

Now you need to set the entire form to flow.

9 In the Hierarchy palette, select the PurchaseOrder subform.

10 In the Object palette, click the Subform tab and, in the Content list, select Flowed.

Setting the entire form to flow, formats each subform in the form, one after another, leaving no space between them.

Click to continue: "Fixing the calculation for the Total field" on page 32

Fixing the calculation for the Total field

Now that you have reorganized the contents of your form, the calculation for the total needs to reference the new Table subform.

1 Select the Total field.

2 Drag the Script Editor palette bar until the palette is the required size to show multiple lines.

3 In the Script Source field, revise the script to show the following calculation:

```
sum(Table.Table1.Row1[*].amount[*])
```

4 Deselect the Total field to add the script to your form design.

Click to continue: "Setting the fields to read-only" on page 33

Setting the fields to read-only

For a printable form, you do not want users to edit the fields; therefore, you must set the fields to read-only.

1 In the Hierarchy palette, open the Header subform and select all the text fields (such as PONumber, OrderedBy, OrderedByAddress).

2 In the Object palette, click the Value tab and, in the Type list, select Read Only.

3 In the Hierarchy palette, open the Table subform and select the text fields (partNo and description).

4 In the Object palette, click the Value tab and, in the Type list, select Read Only.

5 Repeat for quantity, unitPrice, and amount.

6 Repeat for the items in the Footer subform (except for the SignatureField).

Click to continue: "Connecting to a data source" on page 33

Connecting to a data source

To merge data with your form, you need to connect to a data source. After you connect, you need to bind the data to a field in your form design.

When you bind the fields in a form design to a data source, you create an association between the form design and the data source that allows you to capture, present, move, process, output, and print information associated with the form design.

1 Select Edit > New Data Connection.

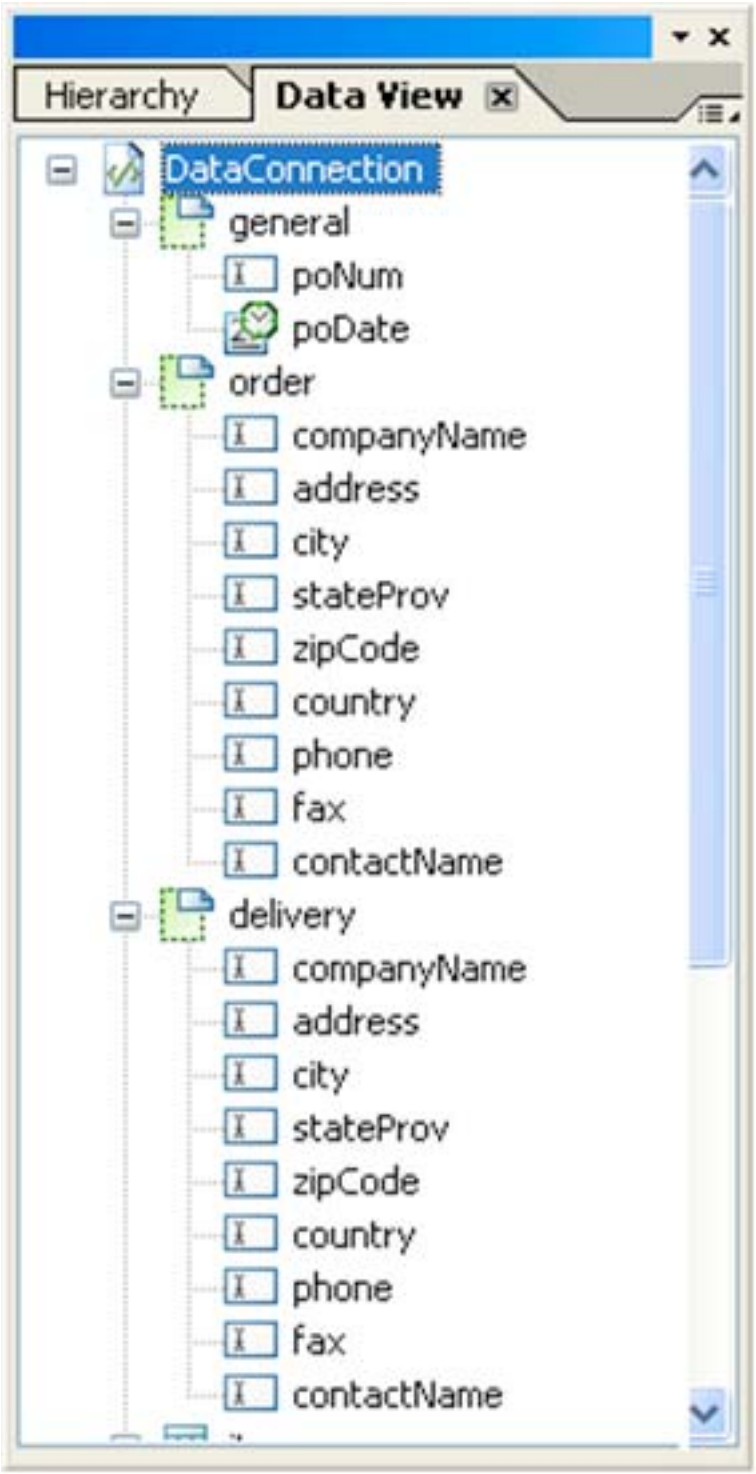
2 Select XML Schema and click Next.

3 If you or your administrator installed the samples that come with Designer, locate the schema named Purchase Order.xsd and click Open.

This file is located in \EN\Samples\Forms\Purchase Order\Schema\Schema.

4 Click Finish.

The data appears in the Data View palette.



The Data View palette displays a hierarchy view of each data source. The top node in the hierarchy represents the data connection and displays the name that you assigned when you created the connection.

Click to continue: "Binding the data to fields and table cells" on page 35

Binding the data to fields and table cells

After you connect to a data source, you need to indicate where you want to see the data in the form design:

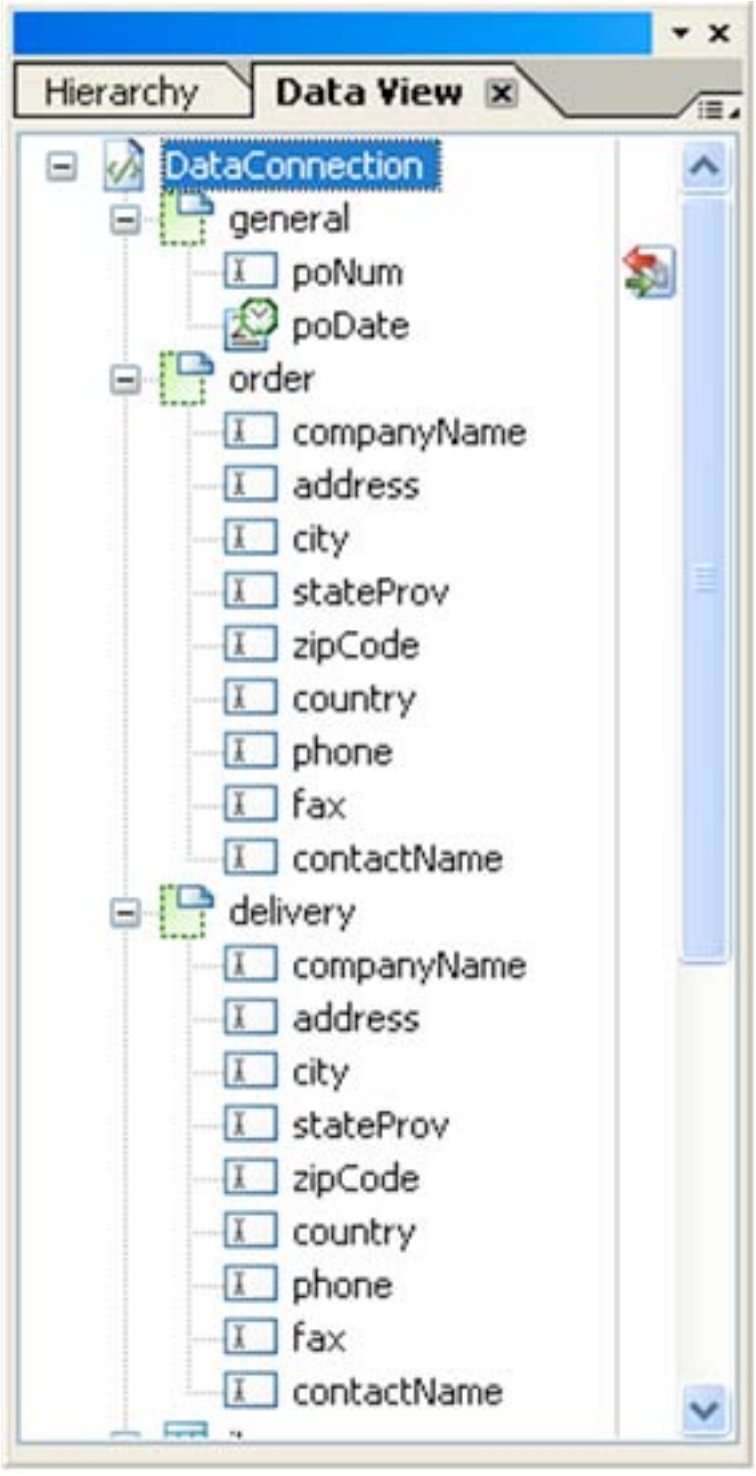
- To bind single fields, such as the P.O. Number and P.O. Date, you can use the drag and drop method.
- To bind repeating objects, such as the row in the purchase order table, to repeating items in the schema, use the Data Binding box in the Binding tab of the Object palette. After the row is bound, you can bind cells in the row to nodes in the schema, which makes these bindings relative to the row binding.

To bind the data to fields in the form design

1 In the Data View palette, select poNum and drag it to the P.O. Number field.

2 In the Binding Properties dialog box, select Don't Update Any Related Properties, and then click OK.

Binding associates an existing form field with an item from the data source. In the image, the icon to the right of poNum shows that the node is bound. Because you chose not to update any related properties, Designer keeps the formatting you have already applied to the field object intact.



3 Repeat for the remaining items in the Data View palette (except for partNum, description, quantity, and unitPrice).

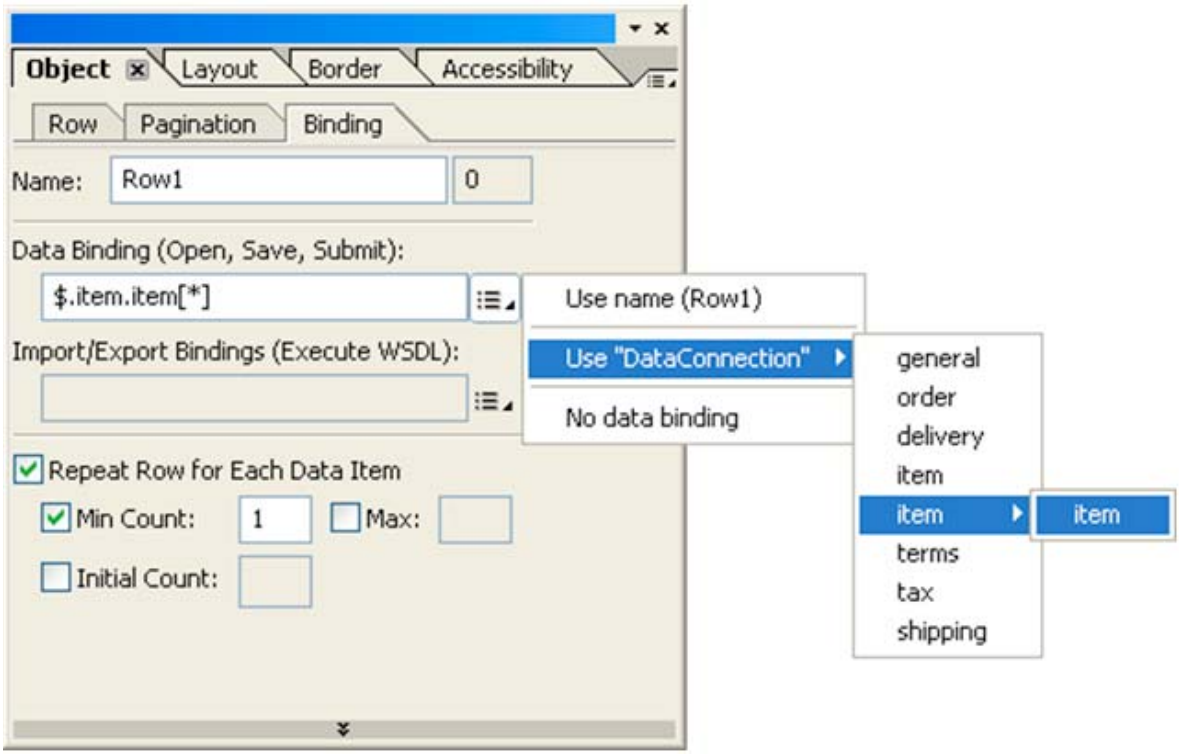
For example, companyName should be bound to the Ordered By field.

To bind the data to table cells in the form

1 In the Hierarchy palette, select Row1.

2 In the Object palette, click the Binding tab.

3 Click the triangle beside the Data Binding (Open, Save, Submit) box and select a binding. For example, select DataConnection > item > item.



The following string appears in the Data Binding (Open, Save, Submit) box:

```
$item.item[*].
```

You can type this string into the Data Binding (Open, Save, Submit) box instead of selecting it.

4 Open the Data View palette.

5 To ensure that the binding is set the way you prefer, bind each node to a cell by using the drag and drop method. For example, in the Data View palette, select partNum, and drag it to the cell under the heading Part No.

6 In the Binding Properties dialog box that appears, select Don't Update Any Related Properties and click OK.

7 Repeat for the remaining items in the Data View palette under item (description, quantity, and unitPrice).

Click to continue: "Specifying a data file" on page 38

Specifying a data file

The last task is to point to a data file to merge with the form.

1 Select Edit > Form Properties and click the Preview tab.

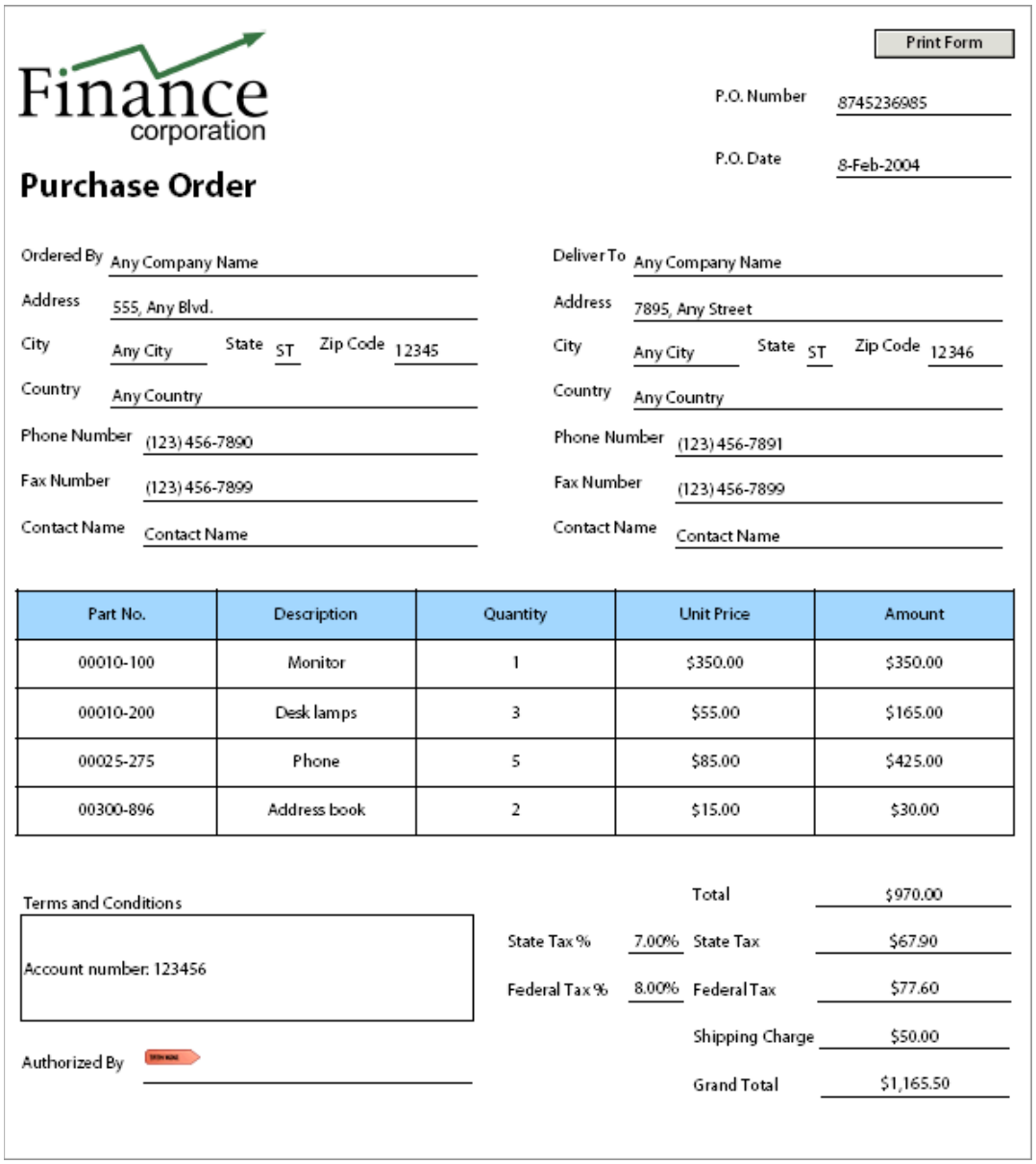
2 In the Preview area, browse for the location of the data file you want to use.

For example, if you or your administrator installed the samples that come with Designer, locate the data file named Purchase Order.xml, which is located in \EN\Samples\Forms\Purchase Order\Schema\Data.

3 Click Open and then click OK.

4 View the form in the Preview PDF tab.

Your form should now look like this illustration.



The Purchase Order.xml data file that comes with Designer contains four records. You can modify this XML file so that you can test the layout of the form to verify that it adjusts to accommodate data by using a data file that contains more data.

(Optional) To test the Purchase Order form to ensure it that is flows the merged data properly:

1 Open the XML file and find the following lines:

```
<item>
<partNum>00300-896</partNum>
<description>Address book</description>
<quantity>2</quantity>
<unitPrice>15.00</unitPrice>
</item>
Below the previous lines, you can add more items. For example, you can add these lines:
<item>
<partNum>00300-300</partNum>
<description>Clipboard</description>
<quantity>3</quantity>
<unitPrice>5.00</unitPrice>
</item>
<item>
<partNum>00300-325</partNum>
<description>Paper Punch</description>
<quantity>1</quantity>
unitPrice>8.00</unitPrice>
</item>
<item>
<partNum>00300-350</partNum>
<description>Ruler</description>
<quantity>5</quantity>
<unitPrice>1.00</unitPrice>
</item>
<item>
<partNum>00300-400</partNum>
<description>Scissors</description>
<quantity>2</quantity>
<unitPrice>2.00</unitPrice>
</item>
<item>
<partNum>00300-425</partNum>
<description>Tape</description>
<quantity>2</quantity>
<unitPrice>2.50</unitPrice>
</item>
<item>
<partNum>00300-450</partNum>
<description>Glue Stick</description>
<quantity>2</quantity>
<unitPrice>1.00</unitPrice>
</item>
<item>
<partNum>00300-475</partNum>
<description>Stapler</description>
<quantity>2</quantity>
```

```
<unitPrice>4.00</unitPrice>
</item>
<item>
<partNum>00300-500</partNum>
<description>Highlighters</description>
<quantity>1</quantity>
<unitPrice>5.00</unitPrice>
</item>
<item>
<partNum>00300-550</partNum>
<description>Selfstick Notes</description>
<quantity>4</quantity>
<unitPrice>5.00</unitPrice>
</item>
<item>
<partNum>00300-575</partNum>
<description>Composition Notebook</description>
<quantity>5</quantity>
<unitPrice>8.00</unitPrice>
</item>
```

2 Save the revised data file with a new name.

3 In the Form Properties dialog box, click the Preview tab and find the revised data file.

4 Click OK and view the form in the Preview PDF tab again.

Click to continue: "What's next?" on page 40

What's next?

If you have worked through the tutorials, you know the basics of how to set up a form. You may now want to include the header row in the table on subsequent pages. You also may want to add page numbering.