

AMEDD ELECTRONIC FORMS SUPPORT SYSTEM

Version 4.0

Prepared by, Training Team

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INTRODUCTION

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1. The U.S. Army AMEDD Electronic Forms Support System is a system for filling forms and routing them via an electronic mail system. U.S. Army Medical Information Systems and Services Agency (USAMISSA) uses MicroSoft Exchange as the electronic mail system.
2. Objectives - When you complete this class, you will be familiar with the following:

- Screen Layout
- Opening Forms
- Entering Data Into a Form
- Printing Forms
- Sending and Receiving Forms
- Search Feature
- Saving and Updating Forms
- Backing Up Data
- Process Single User Form
- Personal Menu
- Direct Form Access
- Restore
- Categories and KeyWords

The front-end menu developed by USAMISSA is extremely user friendly. If you know how to work in Windows 3X, 9X, or NT you should have no problems working with this product.

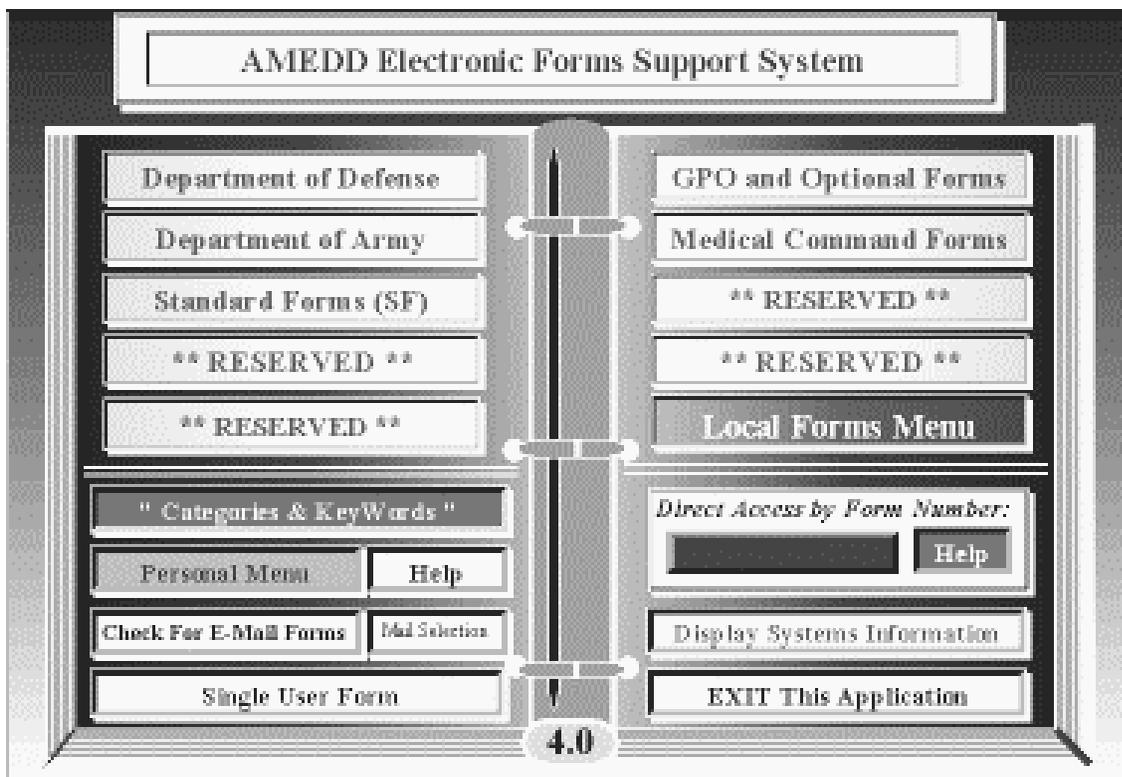
CHAPTER 1

GETTING STARTED

Double-click the AEFSS E-Forms icon/shortcut.

AMEDD ELECTRONIC FORMS SUPPORT SYSTEM MENU

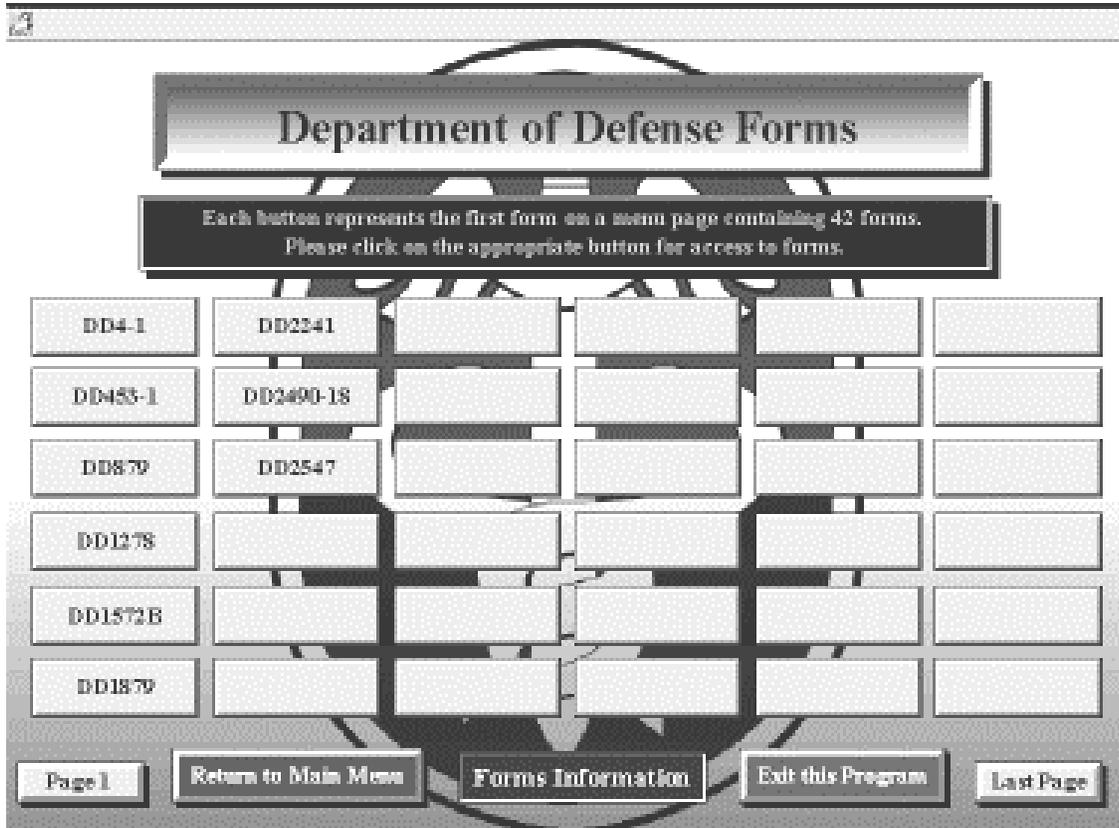
1. Main Menu Displays.



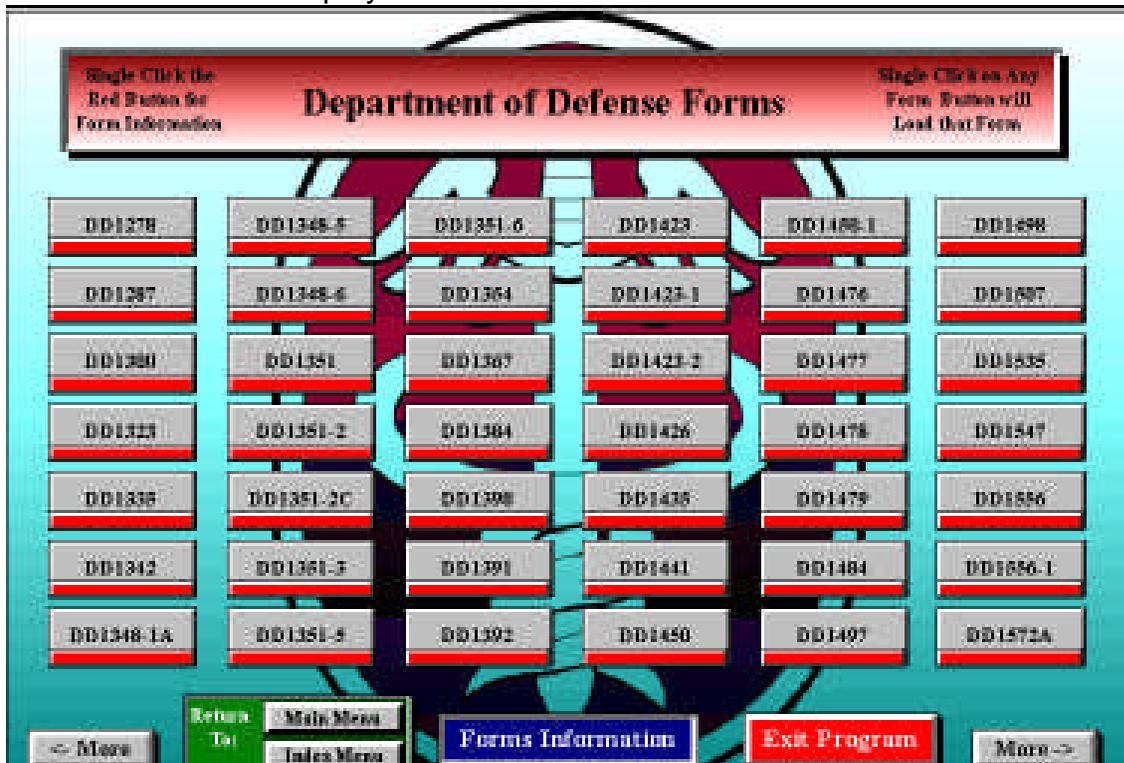
2. Notice the way groups of forms are arranged under the different buttons on the Main Menu. The version number for this menu is displayed at the bottom center.
3. "Categories & KeyWords" have been added to aid in locating forms.
4. Direct Form Access allows you to bypass the index menu for quick access to the form name you enter.

5. The Personal Menu button allows you to group the more frequently used forms in one place for easy access.
6. Click on the appropriate "Group" button, from the Main Menu, for the form you want, Department of Defense.
7. To select a form, you should know the form number and click on the appropriate index button, (DD1278), at the "Index" screen. This represents the first form on the fourth page of the DD Forms.

NOTE: Each button represents a page of forms.



8. The next screen displays. The form numbers are on the face of the buttons.



9. Point and click on the form button DD1354

10. From this screen click Return to Menu at this time.

FORMS INFORMATION

The Forms Information screen lists the form numbers and the versions and titles of the forms. There are over eighteen hundred forms and you can scroll through the entire list.

1. Click the Forms Information button.

Form Number	Form Title	Version	Form Date
DD1378	Certif of OIS Assign to Support Appl to File Petition for Natural	V1.00	1 May 1988
DD1387	Request for Commercial Transportation Annual Active Duty for	V1.00	1 Sep 1986
DD1300	Report of Casualty	V1.00	1 Nov 1991
DD1333	Toxicological Examination - Request and Report	V1.00	1 Jun 1960
DD1335	Field Inspections Data USA, USAN, USMX, DCDX Rail Cars	V1.00	1 Feb 1974
DD1342	Department of Defense Property Record	V1.00	1 Dec 1993
DD1348-1A	Issue Release/Receipt Document	V1.00	1 Jul 1991
DD1348-5	Notice of Availability / Shipment	V1.00	1 Jun 1969
DD1348-6	DOD Single Line Item Requisition System Doc (Manual-Long	V1.00	1 Feb 1985
DD1351	Travel Voucher	V4.00	1 Jul 1965
DD1351-2	Travel Voucher or Subvoucher	V1.00	1 Aug 1997
DD1351-2C	Travel Voucher or Subvoucher (Continuation Sheet)	V1.00	1 Aug 1997
DD1351-3	Statement of Actual Expenses	V1.00	1 Jan 1978
DD1351-5	Government Quarters And Mess	V1.00	1 Jul 1965
DD1351-6	Multiple Demerits List	V1.00	1 Jul 1993

NOTE: Point and double clicking on any Form Number will load that form.

2. Click on Return to Menu, Return to Selection Menu, then Return to Main Menu button.

NOTE: If you click the exit button, this will return you back to the Desktop screen. Please do not click exit at this time.

DIRECT FORM ACCESS

This block will give you quick access to any of the forms.

1. Click in the blank box if you do not have a blinking cursor.
2. Type in the form number SF71.
3. Press Enter.
4. The Standard Form 71 should now be on your screen.
5. Click on Return to Menu.

PERSONAL MENU

The Personal Menu allows you to group together the most frequently used forms in one location for quick access. Click HELP beside the Personal Menu button for on-line instructions

ADDING A FORM TO THE PERSONAL MENU

1. Open the SF71 form.
2. Click on the Add Personal button.
3. Notice the Add Personal button is now grayed out.

NOTE: If you exit now the form will not be added to your Personal Menu.
--

4. Close this form by clicking on Return to Menu. The SF71 form is now added to your Personal Menu.
5. Return to the Main Menu and click on the Personal Menu button. SF71 now shows in your Personal Menu.

DELETING A FORM FROM THE PERSONAL MENU

1. From your Personal Menu, open the SF71 Form.
2. Notice the Add Personal button has been replaced with a Remove Personal button.
3. Click on the Remove Personal button.
4. Notice the Remove Personal button is now grayed out.
5. Click on Return to Menu. The SF71 form has now been deleted from your Personal Menu.
6. You are now back into your Personal Menu and the SF71 form is no longer showing.
7. Click on Return to Main Menu.

SCREEN LAYOUT

Now you will open a form and learn more about the screen layout.

1. From the Main Menu, click the "Categories & KeyWords" button.
2. If you wanted to see certain forms with the word Nursing in the title you could type in a KeyWord, i.e. Nursing. AEFSS would bring up all forms with the word Nursing in the title.
3. In the Enter KeyWord letters to Search Form Titles block, type in Nursing and depress the Enter key.
4. Click on Return to Selection Menu, when you have finished reviewing list.
5. Click on Travel.
6. Scroll down and double click on DD1610 to view the ribbon buttons described on the next page.



BUTTON	FUNCTION
GO TO	Allows you to browse through records from the first, previous, next, or last record.
FIT IN WINDOW	Reduces the magnification of the form display so the entire form appears.
FIT SIDES	Adjusts the display so that the entire width of the form appears.
REAL SIZE	Displays the form at its actual size. The entire width of the form may or may not appear within your workspace.
ENLARGE	Allows you to zero in on part of the form, increasing its magnification to twice the normal size.
PRINT	Prints the form to the Windows default printer.
SPELL	Checks for spelling errors in your form, and suggests corrections for words that it does not recognize.
FAST FILL/DATA ENTRY	Displays only fields for you to enter data. No picture of the form displays on the screen.
VIEW FIELD HELP	Displays information available for current field.
SEARCH	Locates specific records by matching data in a field with a defined value or text string.
SEARCH NEXT	Locates next record matching the specified criteria.
NEW	Displays a new blank record. Prompts you to save if you have made changes to the record and haven't yet saved.
SAVE	Saves the currently displayed record as a new record.
UPDATE	After editing an existing record, updating saves the record in its original order of sequence.
DELETE	Marks the currently displayed record for deletion.
PURGE	Permanently remove records marked for deletion.
ADD/REMOVE PERSONAL	Add/Remove this form from the Personal Menu.
SEND	Allows you to send the currently displayed form in your workspace to other users through your mail system.
RESTORE	Restores data from the A: or B: drive back to the C: drive.
BACKUP	Allows you to back up your data to your A: or B: drive.
RETURN TO MENU	Return to the previous menu.
EXIT	Exits the electronic forms system and returns to the Program Manager.

7. Using the [TAB] key will move the cursor to the next fillable field in the form. If you use the [SHIFT]+[TAB], the cursor will move backward. The up and down arrows will move to other fields. You may also use the mouse pointer to click to a new field and enter data.
8. To close this form, Return to Menu, then Return to Selection Menu.
9. Next, click the Return to Main Menu button.
10. In the next section, you will enter data on the DD 1610 form (Request and Authorization for TDY Travel of DOD Personnel). Department of Defense forms are grouped under the appropriate button.
11. Click on the Department of Defense Group button.
12. From the Index Menu click the appropriate Index Screen button for the DD1610.
13. Click the DD 1610 button. Notice the form displays in the work area and the cursor is blinking in the first field (Date of Request). Format for Date is ddmmyy (01Nov98).
14. Type the current date. Press [TAB] to move to the next field.
15. Type your information in the NAME field. Press [TAB]
16. Continue to fill fields 3-6 now with your information.
17. Now click in the ITINERARY field (#11). Type the following:

From San Antonio, TX to Madigan Army Medical Center, Fort Lewis, WA and return to San Antonio, TX
18. Now move to the MODE OF TRANSPORTATION section.
19. Click once in the Commercial AIR box. Notice a large graphic X displays.

<p>NOTE: Clicking on this box again will remove the X. Only an 'X' or 'space' may be entered in this check box.</p>

20. In section 13, click on X PER DIEM AUTHORIZED IN ACCORDANCE WITH JTR box. These two boxes are 'radio buttons' and only one may be selected.

21. Move to the ESTIMATED COST section. Enter the following amounts in the Per Diem, Travel, Other, and Total boxes respectively:

508.00

297.00

135.00

940.00

22. Type the word MAXIMUM in block 15 (Advance Authorized).

23. Position the cursor in block 16 (REMARKS). Instead of typing text here, you will use the 'Copy and Paste' feature in Windows to get the data from a word processing application.

24. Click on the Start button from the Win95/NT Task Bar.

25. Select Programs.

26. Click on Microsoft Word.

27. In Microsoft Word, under My Document or Personal, open the file tdyrem.doc.

28. Select the entire paragraph then click on Edit>Copy.

29. Exit Microsoft Word.

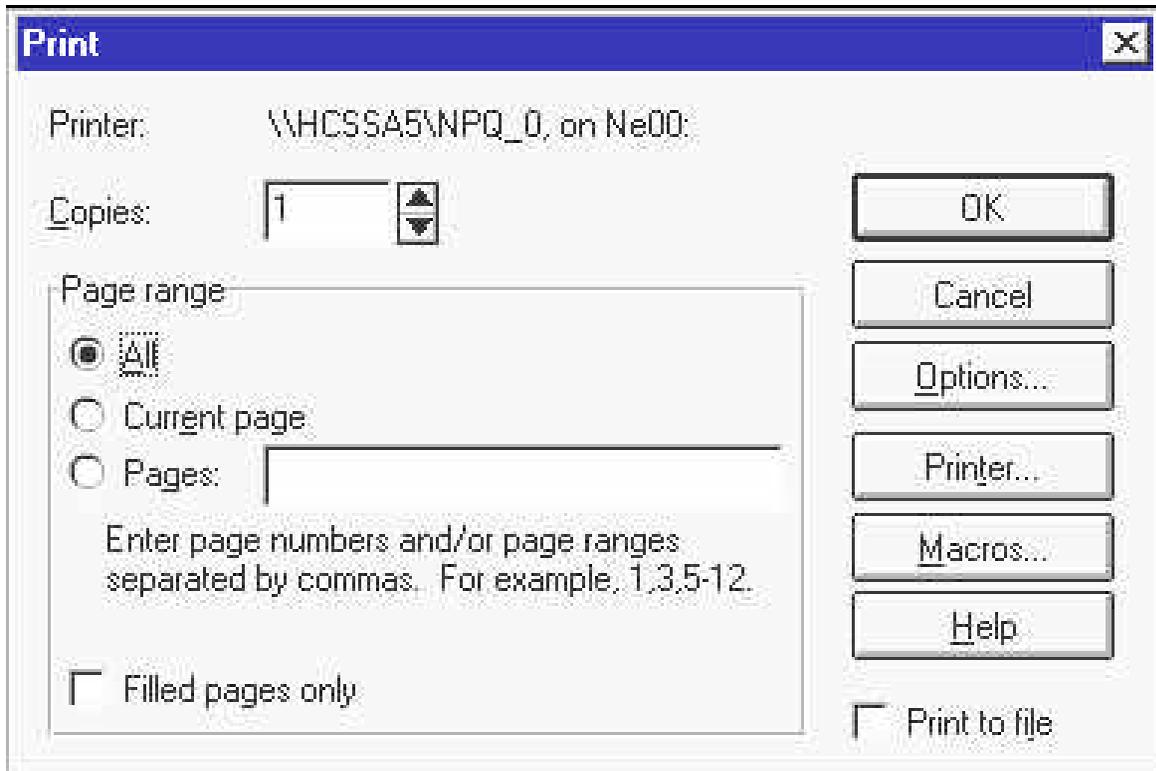
30. With the cursor in block 16, click on Edit>Paste and notice the text from Microsoft Word is now in the remarks section.

SAVING RECORDS

1. Click on the SAVE button.
2. A new blank form should now be on your screen.
3. Type the following names in the next ten records. Be sure to save each record after entering the name.
 - A. Duncan, Churchill William
 - B. Adams, Eve
 - C. Jones, Martin
 - D. Jones, Janine
 - E. Smith, John
 - F. Corona, Ramón
 - G. Corona, Maria
 - H. Summerlin, Scott
 - I. Garza, Dee
 - J. Robin, Christopher
4. This will automatically save and append the data just entered in the current record and display a new blank record.
5. If you select UPDATE, the changes in the record are saved and the record remains where it is in sequence.
6. Go back to your first record which should have your name on it by clicking on the "Go to First Record" button.
7. Change the first fillable field to tomorrow's date.
8. Click on the Update button.
9. If you try to SAVE a record after making an editing change to it, you will be prompted to Update, Add, or Cancel the record. Always be sure to tab out of the changed field prior to clicking on SAVE.
10. Selecting ADD button will automatically append the current record with the changes just entered and display a new blank record.
11. If you select CANCEL, changes to the record are still visible, but they have not been saved.

PRINTING RECORDS

1. Display the record with your information.
2. Click on the Print icon and notice the default settings.



3. Click cancel when done.

CHAPTER 2

SEARCH

You may locate records by matching data in any fields with a defined value or text string.

1. Click on the Search button. The Search on Expression dialog box displays.
2. Notice in the Fields column, all the names of the fields are listed in all CAPS. Point to the word NAME and double click.
3. In the Search Criteria portion of the dialog box, [NAME] displays when successfully selected. Type an equal sign [=] next to [NAME].
4. [The last part of the search criteria must have beginning and ending quotes.] Type "Corona" and then click the Forward button to start the search.
5. Since no first name was specified, the first "Corona" in the records is the one that displays on the screen since it matches the criteria in the Search on Expression dialog.

SEARCH NEXT

You may locate the next record matching the criteria by using the SEARCH NEXT button. The button only searches forward.

1. AEFSS is not case sensitive to field names or strings placed in search expressions. Upper and lowercase letters are treated as equals.
2. Below are some examples of Search on Expression criteria:

EXAMPLE: [LASTNAME]>="M"

Records with names starting with the letters "M" through "Z" are located.

3. EXAMPLE: [LASTNAME]="Jones"&[DATE]=>"1999/04/25"

Searches two different fields [NAME] and [DATE] for conditions at the same time.

4. Once you have defined your Search on Expression criteria, clicking on either Forward or Backward will start the search.
5. If you start on the first record, only Forward is available; if you start on the last record, only Backward is available.
6. Click on Return to Menu button, then the Main Menu button.

BACKUP DATA

You can backup the data you have typed on the forms very easily using the Backup icon from the button bar.

1. Open Form SF71.
2. Fill in the name block with your information and click SAVE.
3. Click on the Backup icon.
4. Place a diskette in the PC floppy drive
5. Click on the letter of the drive from the dialog box.
6. If prompted to SAVE, ABANDON, or CANCEL, click on ABANDON.
7. When the backup is complete, a dialog box displays with prompt "Database translated successfully". Click OK.
8. Remove the diskette. This is a backup copy of your data for that form.
9. Click on the Return to Menu button and then the Main Menu button.

RESTORE

SPECIAL NOTE: Restoring data backed up in a previous version of AEFSS can cause error messages and unsaved data if the data structure for the form has changed considerably.

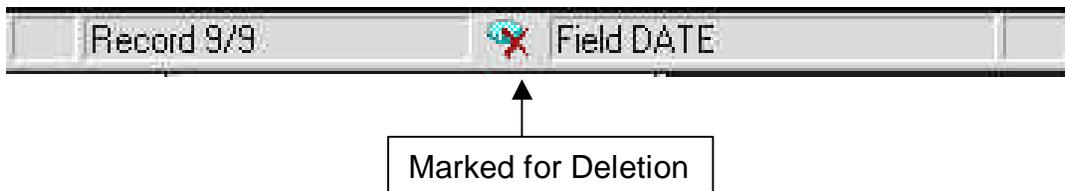
1. From your Direct Access open the form SF71.
2. Place your diskette containing your data into A: or B: drive. In class we will be using A: drive.
3. Click on Restore.
4. Click on the A: drive button.
5. The data contained on the A: drive should now appear on your screen. The records have also been appended to the database on your hard drive.

Note the number of records you have now.

6. Click on the Return to Menu button.

DELETING RECORDS

Records are marked for deletion with the following symbol on the ribbon:



1. You can still view "deleted" records, which have not been purged because they are still present in the form database. In fact, you can "undelete" a record marked for deletion.
2. In the following steps, mark the following DD1610 records for deletion:
3. Open DD1610.
4. Using the "Go To Buttons", display the record for Eve Adams.

5. Click the Delete button.
6. Click Yes because you are sure you want to delete this record.
7. Read the Warning displayed on the screen. Click NO because you would not like to purge the database at this time. (You still have more records to delete).
8. Notice the new delete symbol on the ribbon indicating this record is "marked" for deletion.
9. Also mark Ramón Corona's record for deletion.

UNDELETING RECORDS

You can undelete records very easily. Follow this example:

1. Go back to Eve Adams' record.
2. Click the red X on the Bottom status bar. Notice the record is no longer marked for deletion.

PURGING RECORDS

Purging records will permanently remove records marked for deletion.

1. Check the number of records in the ribbon display at the bottom of the screen and note how many total records you have. You have one record marked for deletion from the previous section. To delete it permanently, click the Purge button.
2. A warning dialog box displays. Click the Yes button to delete it from the database.
3. Now check the number of records total. It should have decreased by one.
4. Click the Return to Menu button.

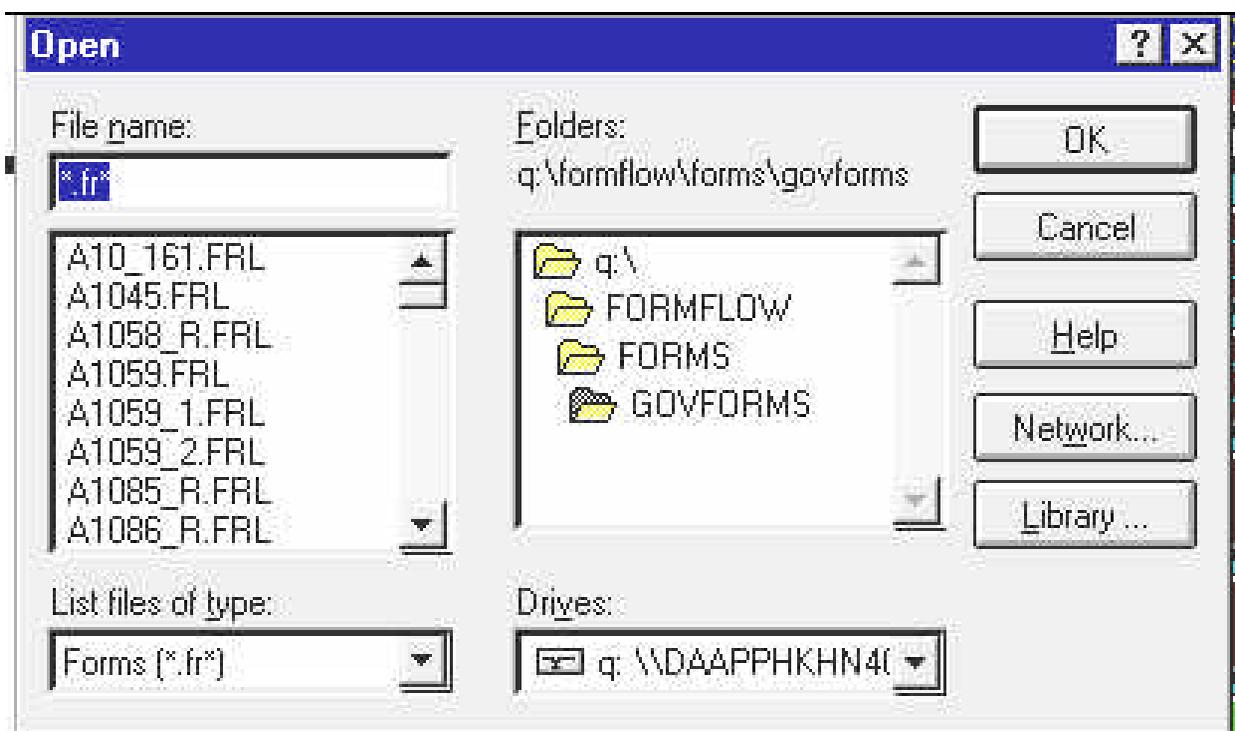
SINGLE USER FORM

The Single User Form button can be used to access records saved to a diskette.

1. When using a form other than one on the file server, you must first save the .FRL file to the diskette or hard drive. We will be using SF71 in class and saving to a diskette.
2. At the DOS prompt key in:
3. Q:
4. cd formflow
5. COPY Q:\FORMFLOW\FORMS\GOVFORMS\S71.FRL A:

NOTE: This will copy the form file from the default location on the file server to a diskette in the A: drive.

6. At the AEFSS Main Menu click on the Single User Form button.



7. In the Drives Block select a:
8. In the List area below the File Name block select S71.
9. Click OK.
10. You will be prompted for the database file name. Click OK to accept the default.
11. The S71 should now be on your screen.
12. Enter data and Save record.
13. You can now take this diskette to use on another PC that has FormFlow Filler.

NOTE: It is not required to have the AEFSS front-end menu.

14. Click on Return to Menu.

WARNING:

If you copy the file from the A: or B: drive to the C: drive, it will overwrite the file on the C: drive. See directions for restoring data from the A: drive to the C: drive earlier in this chapter.

CHAPTER 3

SENDING A FORM

You may send forms to other CC:Mail or Exchange users. If using CC:Mail AEFSS will prompt you to sign onto your CC:Mail system before displaying the Send Form dialog box. If you are using MS Exchange there is no need to log into the mail system.

1. Open form DA3918-R (Facsimile Transmittal Header Sheet).
2. Fill in the top row of fields on this form (remember to TAB between each field).
3. Click the SEND FORM icon.
4. Notice the default subject is the form's file name.
5. Click once on the ADDRESS button and the Address message box displays.
6. Type the last name of the recipient (i.e. STUxx) and notice the highlight bar moves to those letters in the list.¹
7. When the recipient's name highlighted click on the TO: button. Notice the name displays in the TO: portion of the screen.
8. The ADDRESS BOOKS are the same as in your CC:Mail or Exchange.
9. Click on OK and notice the name is now in the Recipients box.
10. Click in the NOTES box. Key in a brief message. This will appear as a normal message accompanying the form.
11. The DATA RECORDS field is used to select the records to be sent.
12. Current means only the record displayed on the screen will be sent.
13. All sends all records in the database for this form.
14. Selected sends all records matching the criteria used in the most recent search.

¹ In the regular office environment, you would type the last name, then the first name just as it appears in the regular post office listing of CC:Mail.

ROUTING MESSAGES

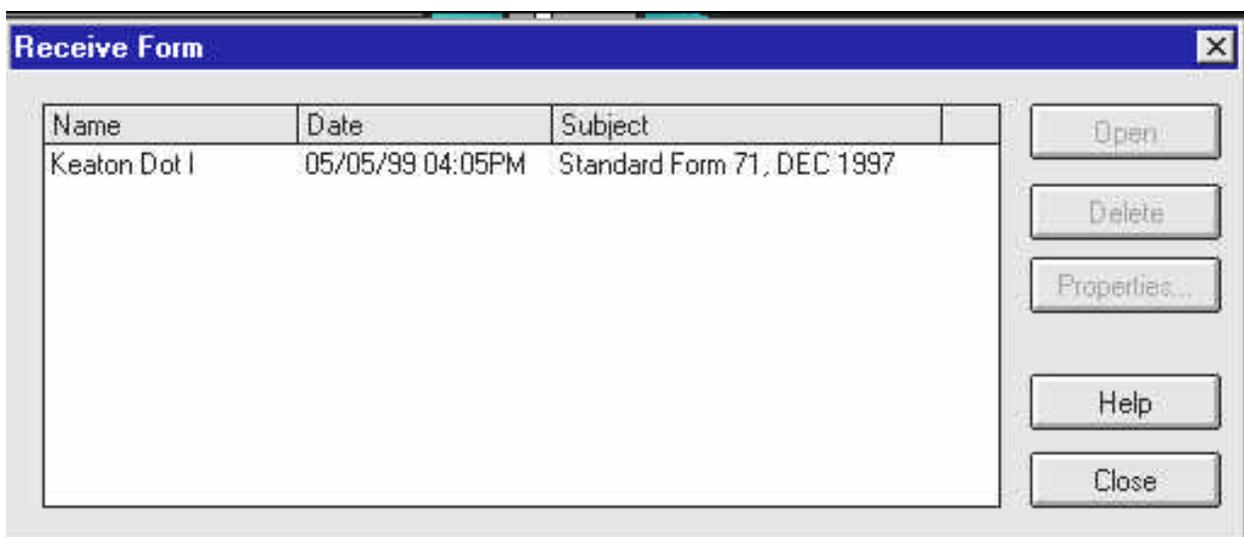
A user may send a form to more than one user according to a set of predefined instructions. There are two routing methods available in the electronic forms system.

1. Broadcast Form - A form sent by one person (the originator) to several people, all at the same time.
2. Sequentially Routed Form - A form sent by one person (the originator) to a second person, who processes it and forwards it to a third person, and so on, in a sequence defined by the originator.
3. Click the OK button to send this form. A small dialog box displays the process of sending the form.
4. If you haven't saved the form yet, you will be prompted to do so.

RECEIVING FORMS

When you receive a mail message with a form file, go into AEFSS and Check for E-Mail Forms.

1. For this next exercise, go back to the Main Menu.
2. From the Main Menu, click the Check for E-Mail Forms button. A dialog box similar to the following one is displayed.
3. Notice the Receive Form dialog box displays.



4. Select the form and then click on the OPEN icon.
5. The form will display on the screen in the work area. The form can now be forwarded to another individual via CC:Mail or Exchange OR can be edited and returned to the sender.
6. Click on the ATTACHED NOTES button to view any attached message.
7. Click OK to exit the Notes dialog box.
8. Click in any block and change the data.

NOTE: Users must remember to click on APPEND DATA before exiting back to the menu to save a copy of the data to their data file.

9. Next, click the RETURN FORM button. The form will be returned to the originator.
10. Click on the OK button.

NOTE: FORWARD FORM will display a sequential list of recipients yet to receive the form.

11. Click on NO when prompted to check for another received form. You could check for additional forms if desired.

CHAPTER 4

SPELL CHECK

Use the Check Spelling command to ensure that all text on your form is spelled correctly. You can check the entire form, or individual objects.

1. The AMEDD Electronic Forms Support System compares the text on the form with entries in the default dictionary.
2. If a word is found which is not in the default dictionary, the word is selected and a list of possible spellings for that word is displayed.
3. Options presented to you in the Check Spelling dialog box are described in the chart below:

TO	ACTION	RESULTS
Skip the unknown word.	Click Ignore.	The word is ignored. If the word occurs again, it is flagged again.
Skip all occurrences of the word.	Click Ignore All.	The word is ignored. If it occurs again, it is ignored.
Change the word to a word on the Suggestions list.	Click Suggest to display a list of possible replacements. Click the word you want, then click Change.	The unknown word is replaced with the suggested word.
Change all occurrences of the displayed word to a word on the Suggestions list.	Click Suggest to display a list of possible replacements. Click the word you want, then click Change All.	The word is replaced with the suggested word. Any further occurrences of the same word are also replaced.
Add the unknown word to your custom dictionary.	See your Systems Administrator for instructions.	
Stop spell checking and close the Check Spelling dialog box.	Click Done.	