

# An Introduction to MetaForms 2.0

## Features Demonstration



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### *How to use this Demonstration*

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MetaForms provides integrated document management and publishing features for the production of electronic documents from a variety of sources. Through MetaForms you can:

- ◆ browse your document repository, and access many of TopLeaf's features
- ◆ check out files for editing, and submit them back for processing
- ◆ create composite PDFs containing TopLeaf managed XML documents, Word document, Excel spreadsheets and PostScript or PDF files

This demonstration takes you through some of MetaForms's features, and quickly shows you all the basic elements of MetaForms's user interface. We recommend you have some familiarity with TopLeaf XML Composition Software. Some of the terminology used in this demonstration applies to TopLeaf software specifically.

In order to use this features demonstration document effectively, TopLeaf and MetaForms must already be installed and accessible to you.

### **Accessing MetaForms**

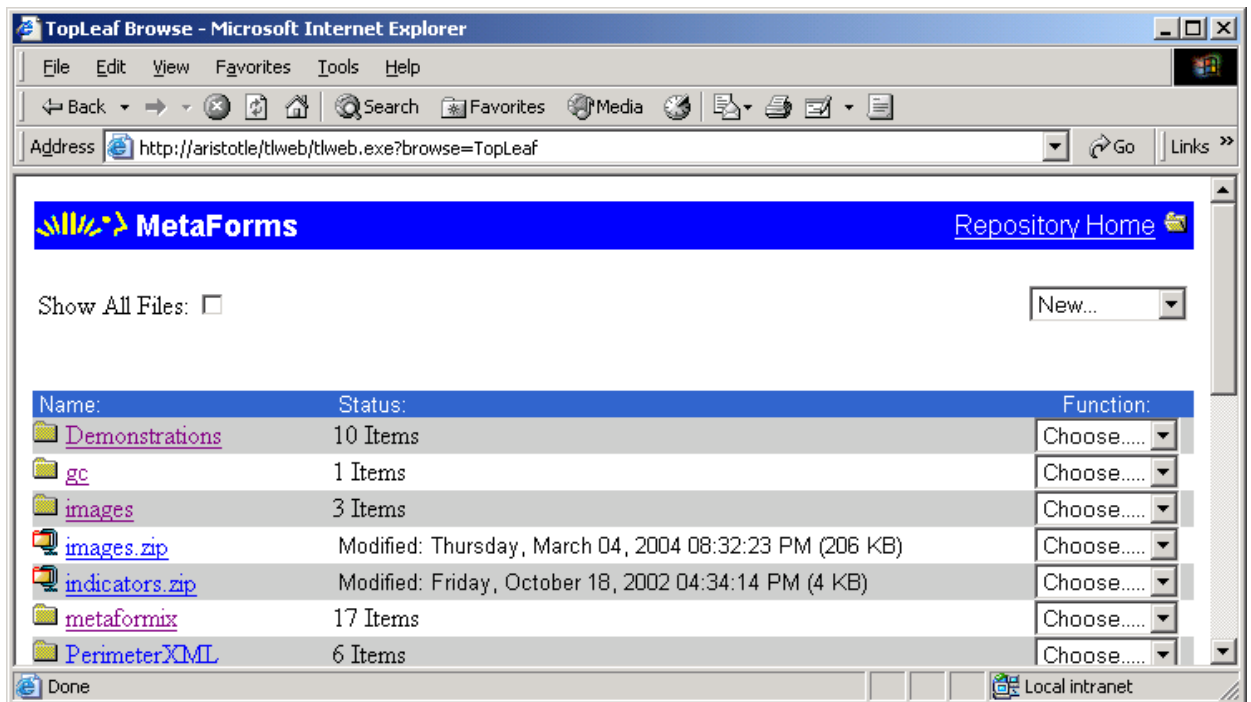
MetaForms is accessed by entering an Internet-style address in your web browser. Your MetaForms administrator can provide this address to you. If you have installed TopLeaf and MetaForms on your own computer, then the address will be "http://localhost/metaforms/metaforms.exe"

This brings you to the main, browse view of MetaForms. From here, you are ready to begin the demonstration.



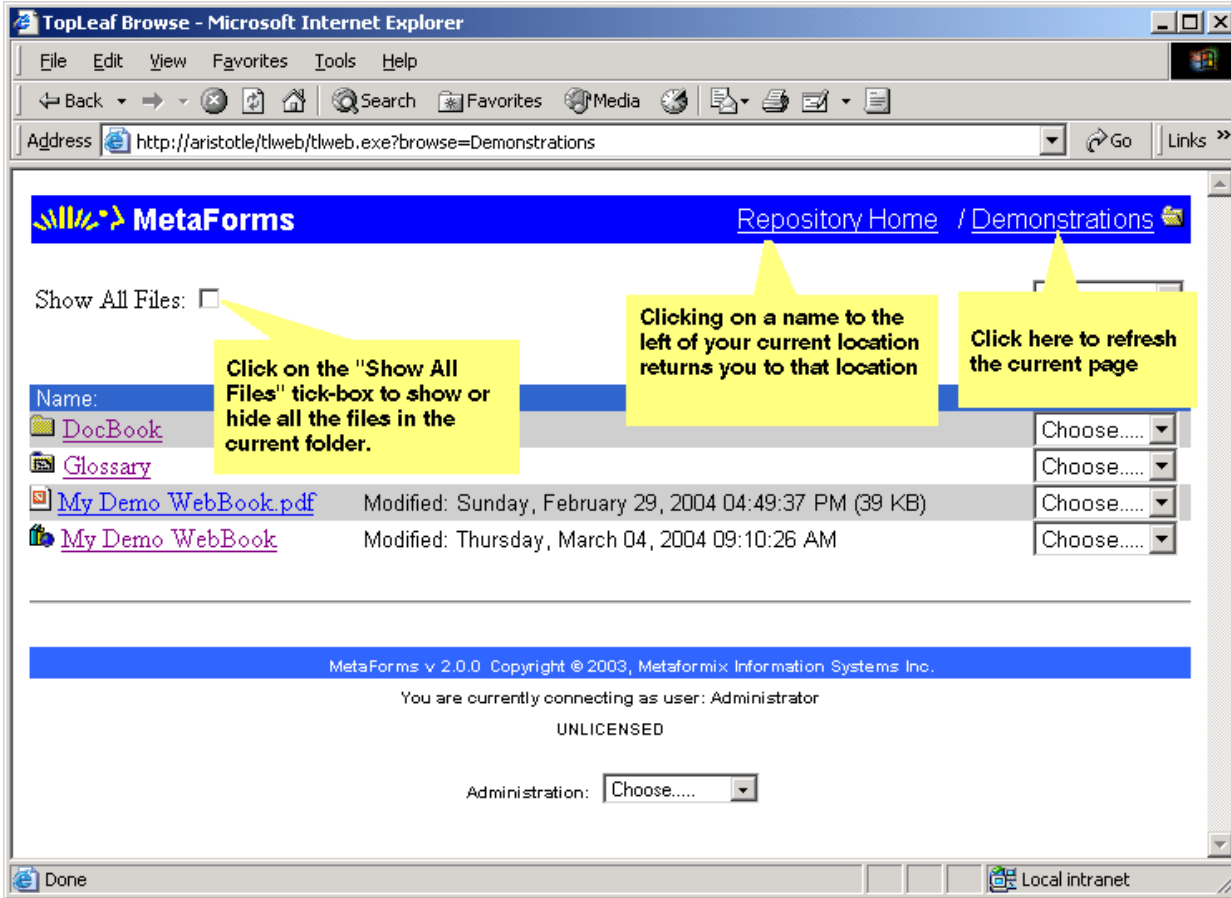
## Browsing The Repository

MetaForms gives you simple, web-based repository browsing. When you first access MetaForms, you are presented with a view of the top level of the TopLeaf repository:

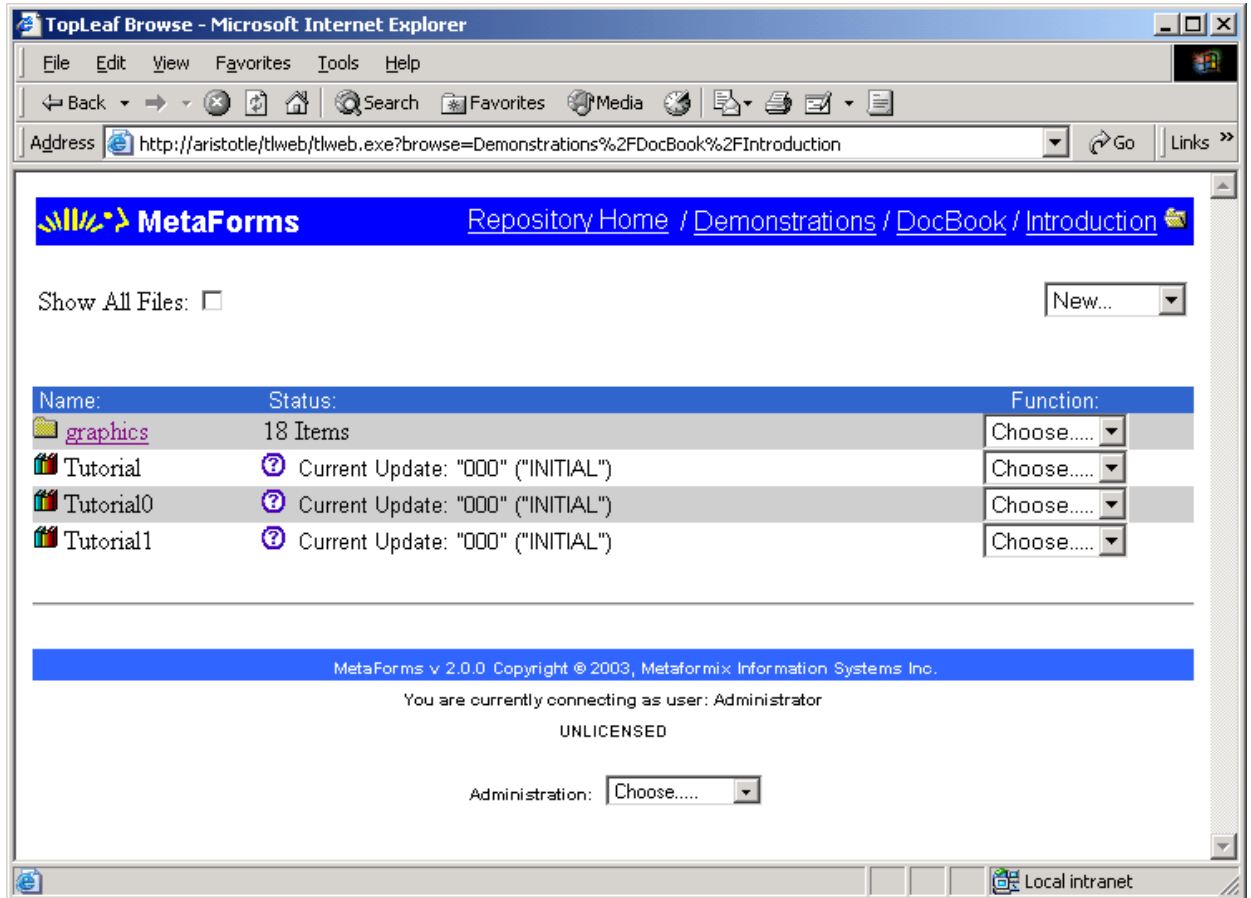


Each folder listed under "Name" represents a TopLeaf department, or another item stored in the repository. The names are hyperlinked, and by clicking on the name of a folder, you can browse to the contents of that folder.

As you browse a department, the MetaForms banner is updated in the right-hand corner to show you your current repository context. You can return to a previous context by clicking on that portion of the name displayed in the top right where you would like to go:

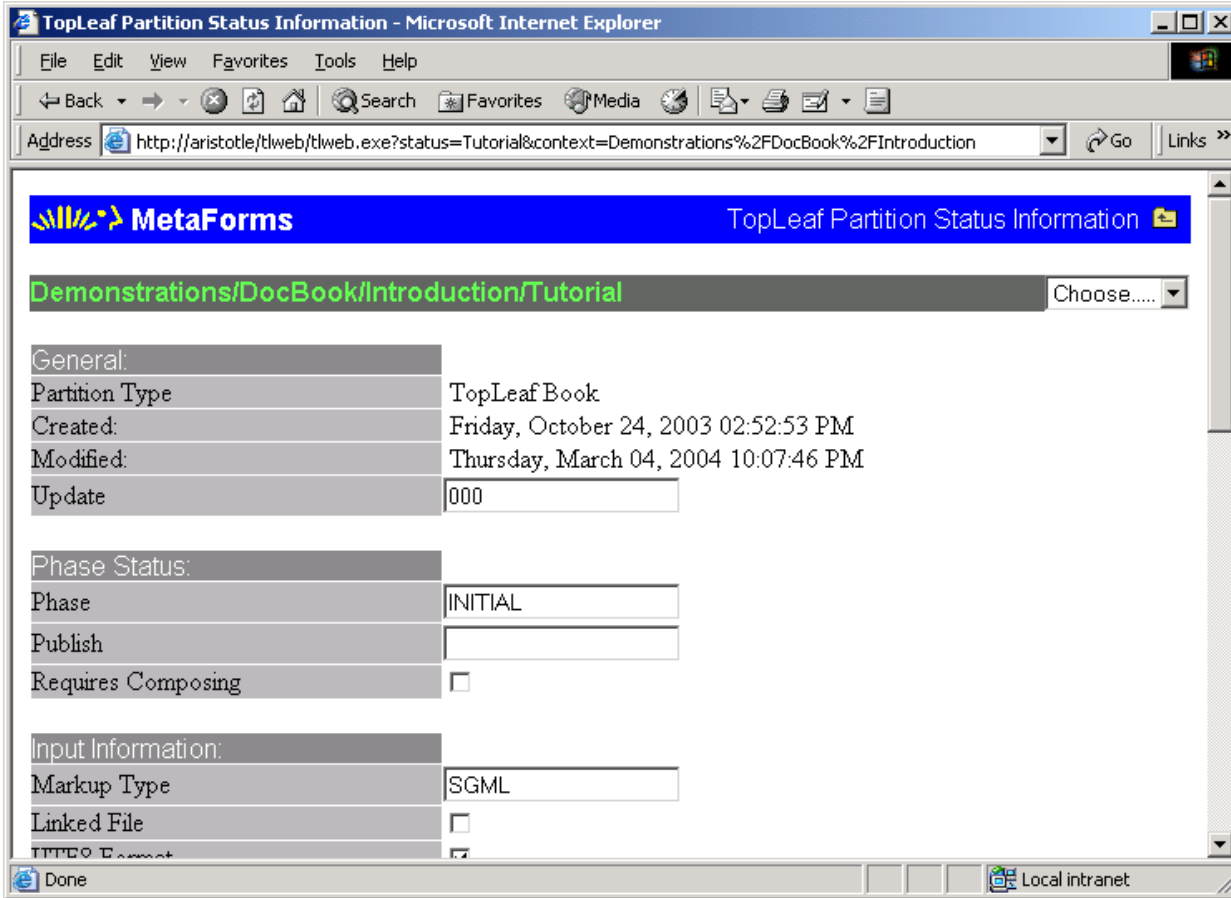


Try clicking on the folder name link for "Demonstrations", then "DocBook", then "Introduction". These are standard TopLeaf demonstration partitions built using the DocBook DTD. You should see something like the following:



TopLeaf partitions come in two types: TopLeaf Books, and Loose-leaf. A TopLeaf book is shown with a book icon beside its name, as seen above. A partition is actually a directory, but because many different files get associated together as a partition, MetaForms does not let you browse a partition by clicking on its name. (You can browse the contents of a partition by using the "Choose." pull-down to the right of the partition's listing.) Within the DocBook demonstrations, there are three partitions, named "Tutorial", "Tutorial0" and "Tutorial1". The information in the "Status" column beside their names indicates their numeric update level, and their TopLeaf workflow phase (one of "INITIAL", "PUBLISH" or "UPDATE").

The circled question mark at the start of the "Status" column is hyperlinked. Try clicking on the question mark for "Tutorial". You will see something like the following:

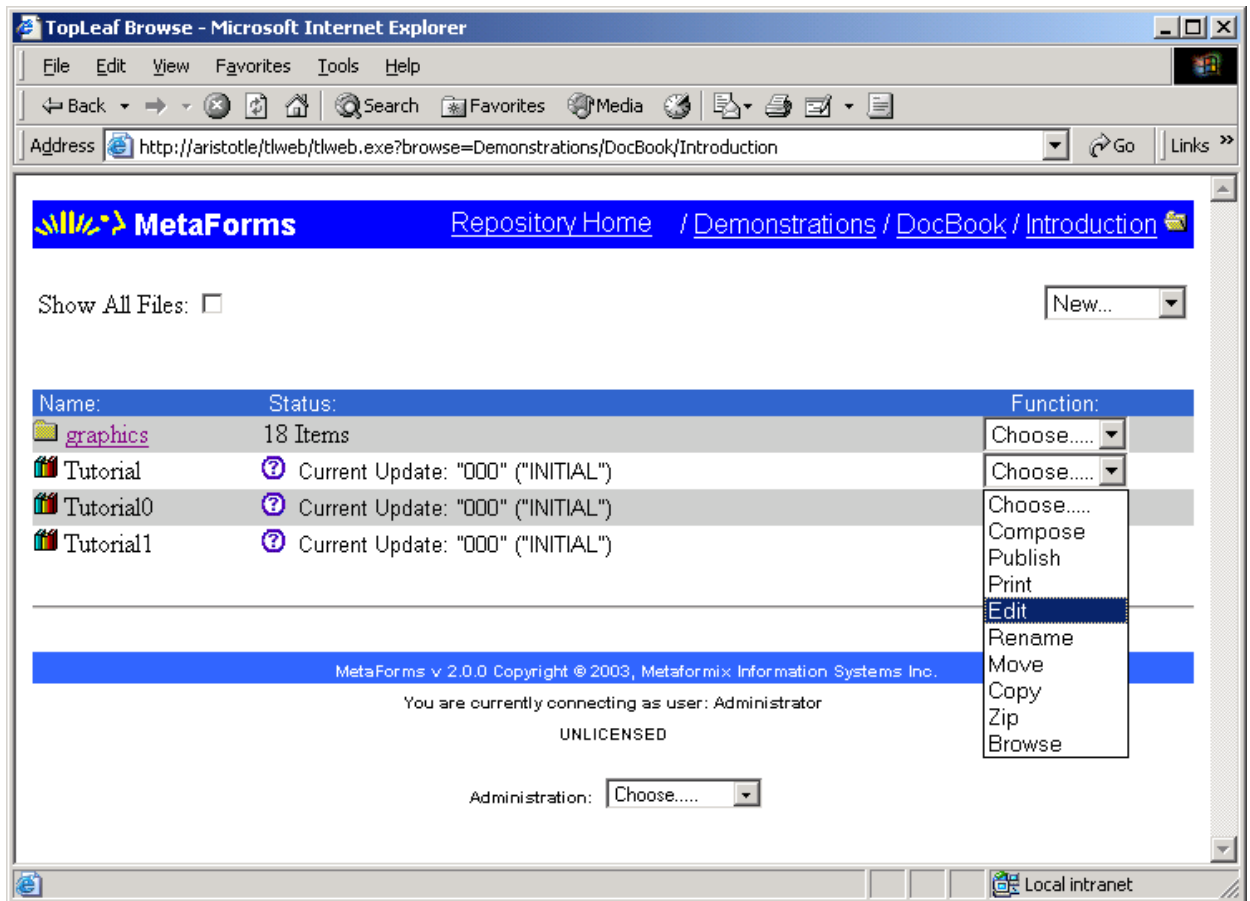


This page shows several of the partition status settings, some of which are updateable, and some of which are not. You can return to the folder where the partition is stored by clicking on the folder with the up-arrow, in the top, right corner of the web page. (Click it now.)

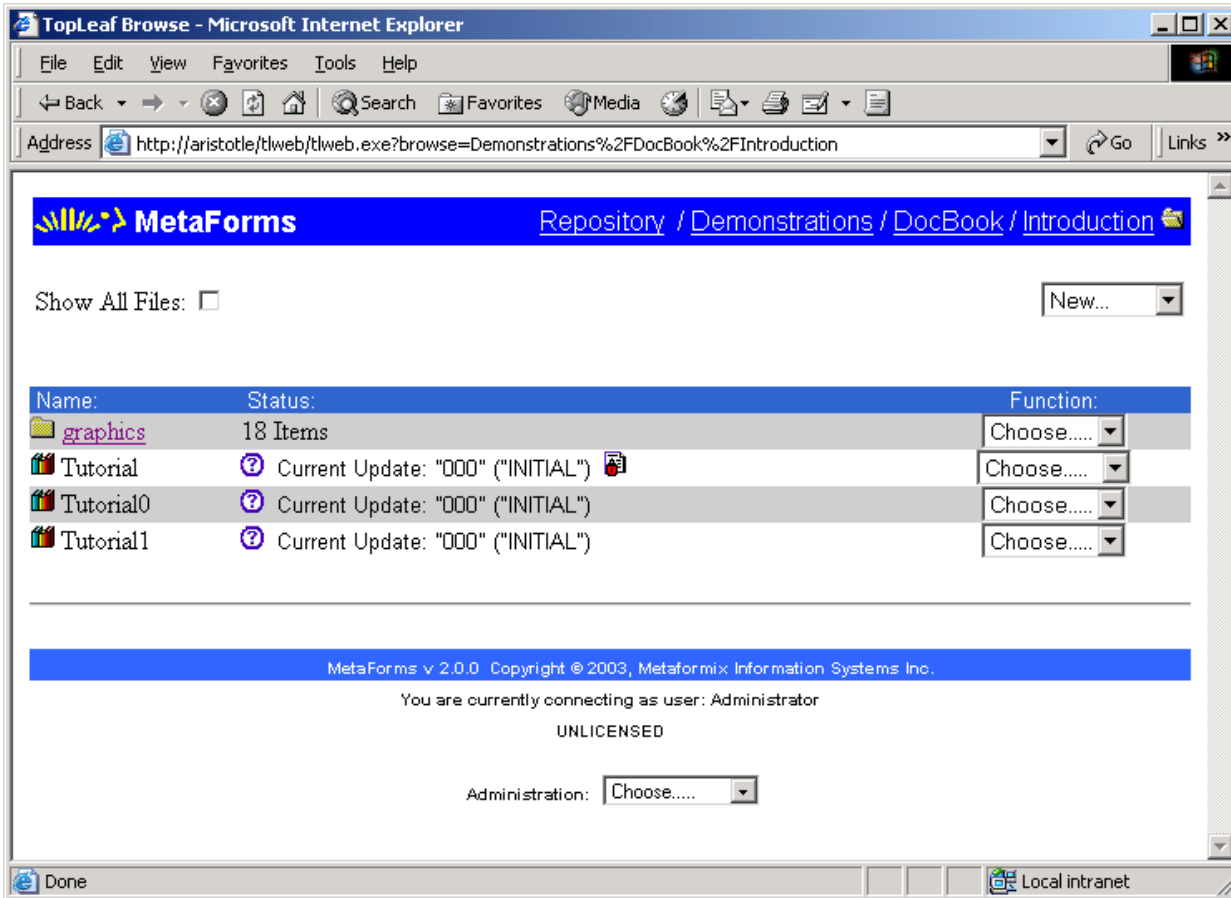


## Retrieving XML Files

You can download a partition's XML file for editing from MetaForms by clicking the "Edit" button in the "Choose....." pull-down button in the partition's "Function" column, as shown below:



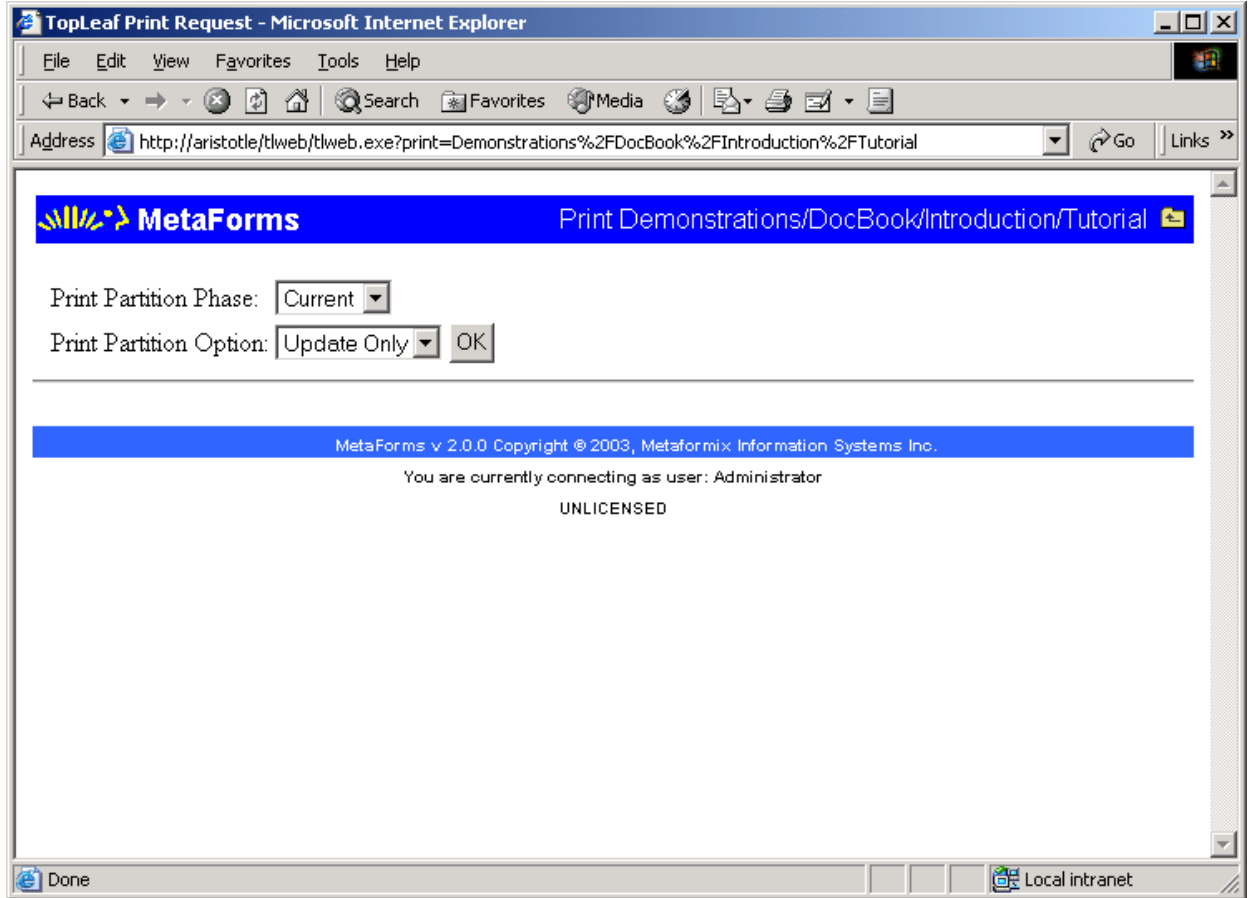
After downloading the file, click on the "Introduction" portion of the context in the banner at the top of the page to refresh the page. The partition is then flagged as being "edit locked", and no other users are able to check it out, until it is checked in, or until the edit is canceled.



At this point, you can edit the XML file, if you like, and then use the "Choose." "Submit" function to check the file back in. (If you do not want to actually edit the file, you can simply cancel the edit.)

When you check the file back in, MetaForms shows "Composition Required" in the status column. (If you cancel the edit, you do not see this.) Once the file has been checked back in, it needs to be composed. Use the "Choose...." "Compose" command to compose the document. After launching composition, you can click the "DocBook" link in the banner to refresh the page to monitor the status of typesetting. During typesetting, the status for the partition may show "Composing". When composition completes, you will not see "Composing" in the status column. (If you see "Composition Errors", then typesetting was not successful. Click on the "Composition Errors" link to view the typesetting engine's log file.)

After composition, you can view the composed pages by printing the partition via "Choose...." "Print".



You can choose which phase of the document you wish to print (if there is more than one), and which pages in the set you wish to print (for TopLeaf Book partitions, you always print all pages; for Loose-leaf partitions, you can choose to print just those pages which have been updated).

Most of the time, you will accept MetaForms's default values (Current, and Update Only). When you click "OK", MetaForms sends the print request to TopLeaf. When the print request is complete, a PDF file is created in the folder containing the partition document.

You will see a file called "Tutorial\_update\_CURRENT.pdf". This is the PDF representation of the partition data. You can click on the name of the file to view the PDF through your browser (if you have Acrobat Reader installed on your PC).





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## *Integrated Zip File Creation*

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MetaForms has integrated zip-file creation for folders and partitions controlled by TopLeaf. You can create a zip of an entire folder or a document partition by selecting "Zip" from the "Choose....." menu.

The zip file is created in the same location as the folder or partition you have zipped. Once it is created, you can then click on the zip file name or choose "Edit" to download the zip.

NOTE: Zipping is provided primarily as a means of transferring TopLeaf partitions and folders between TopLeaf systems.





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## WebBooks

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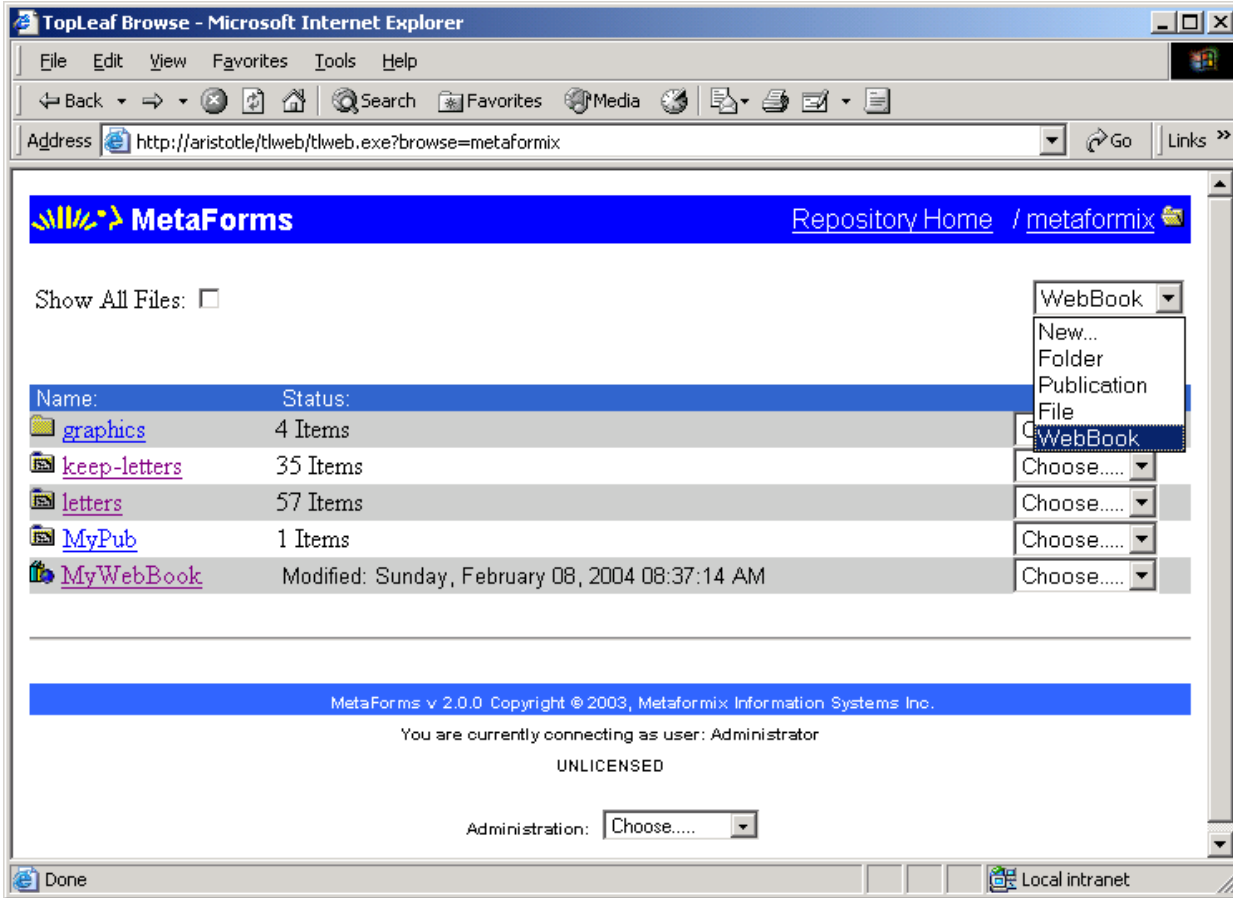
For large, complex, multi-chapter documents, MetaForms provides an easy way of associating many different MetaForms managed documents together, through WebBooks.

WebBooks allow you to specify a sequence of documents that, together, should comprise one continuous larger work. WebBooks can include TopLeaf partitions, as well as Word, Excel and PostScript or PDF documents. Through WebBooks, you can easily manage the creation of large works from many smaller ones. [NOTE: When Adobe Distiller is used for PDF creation, PDF files in WebBooks are ignored. When Distiller is not installed, PostScript files are ignored.]

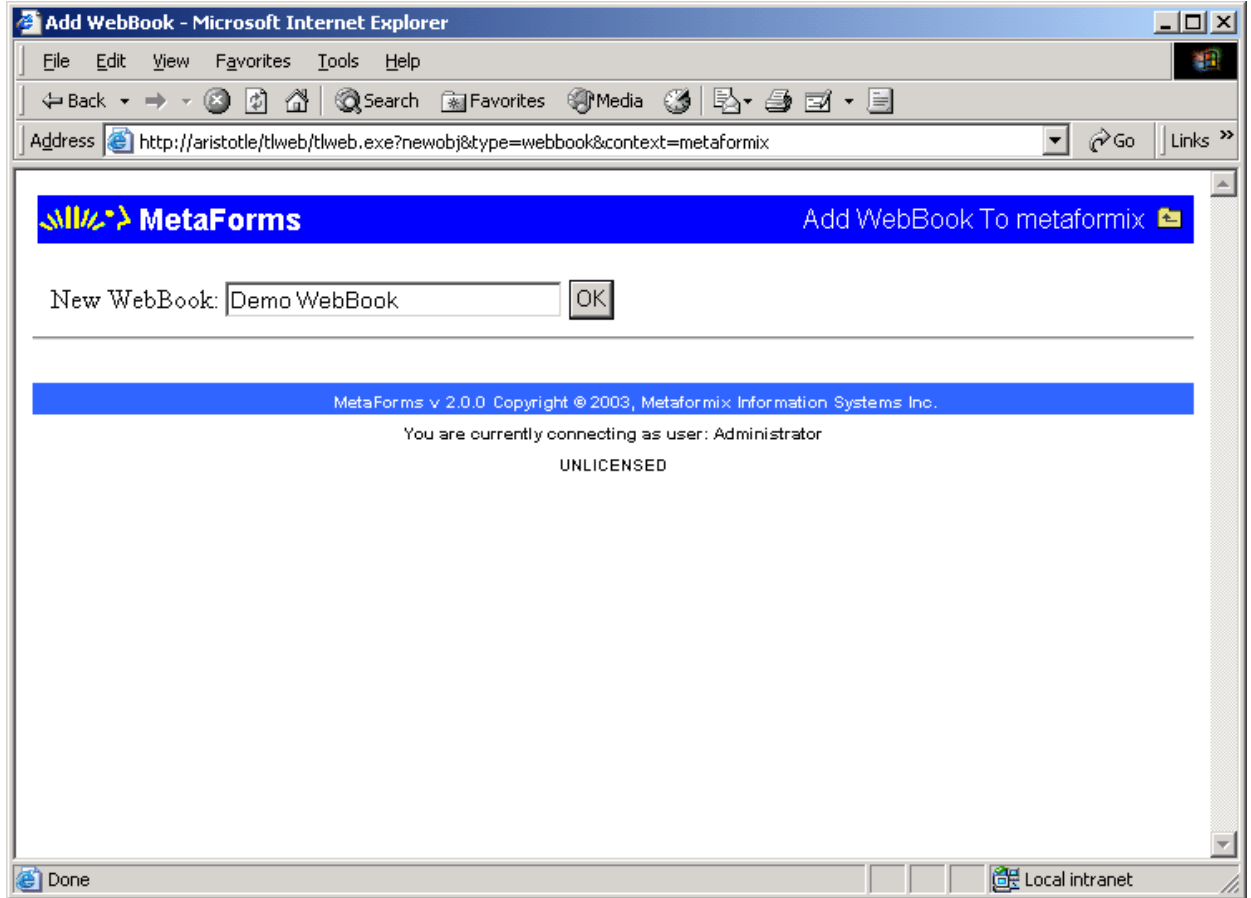
You can create a WebBook anywhere you within TopLeaf that you can create a folder.

Let's create one.

First, browse to the location where you want to create the WebBook, then from the "New" menu, choose "WebBook".

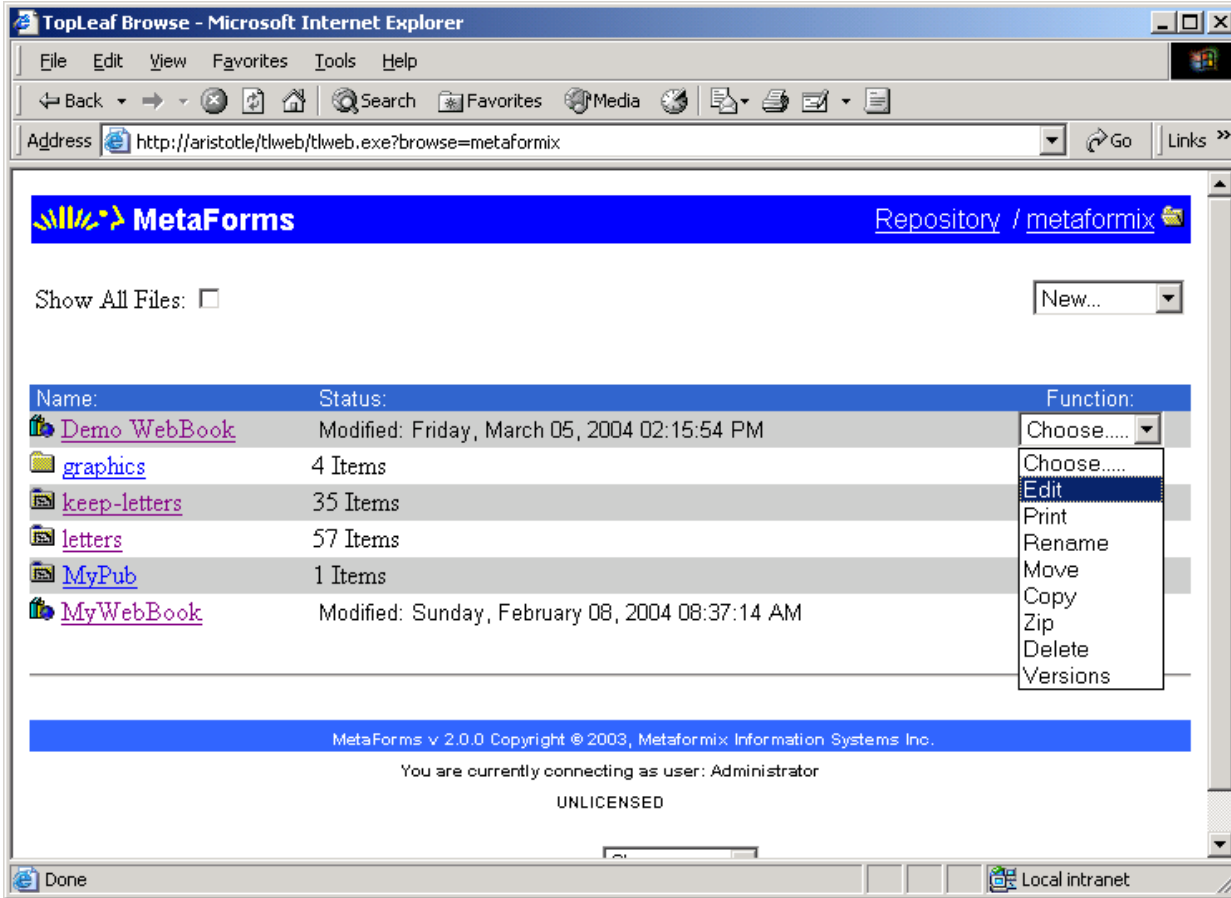


When the "Add New WebBook" page opens, enter the name of the WebBook, then click on "OK"

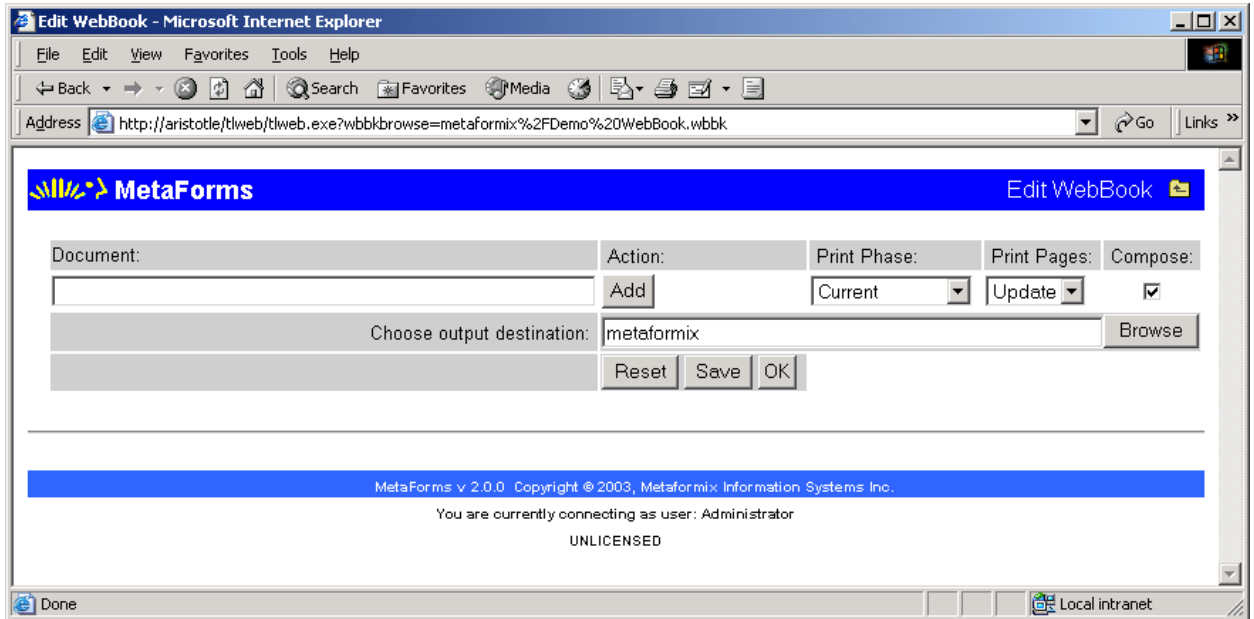


As soon as the WebBook is added, you are directed back to the page where you created the WebBook, and it now appears in the list of objects stored in that location.

From the "Choose" menu for the WebBook, select "Edit"

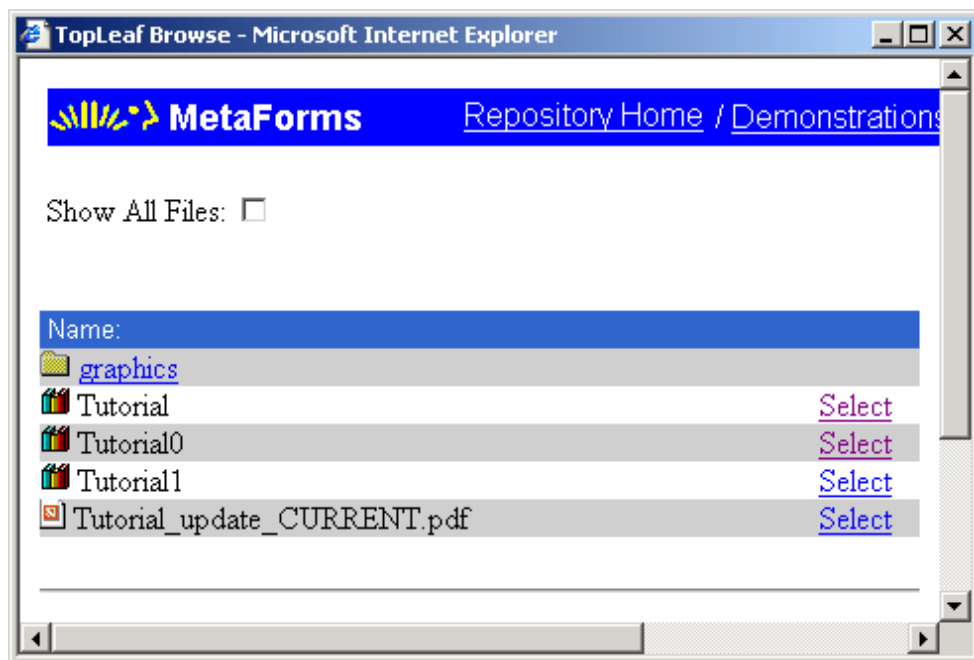


The WebBook editor is displayed. For new WebBooks, there are no documents listed, so you must add at least one document.



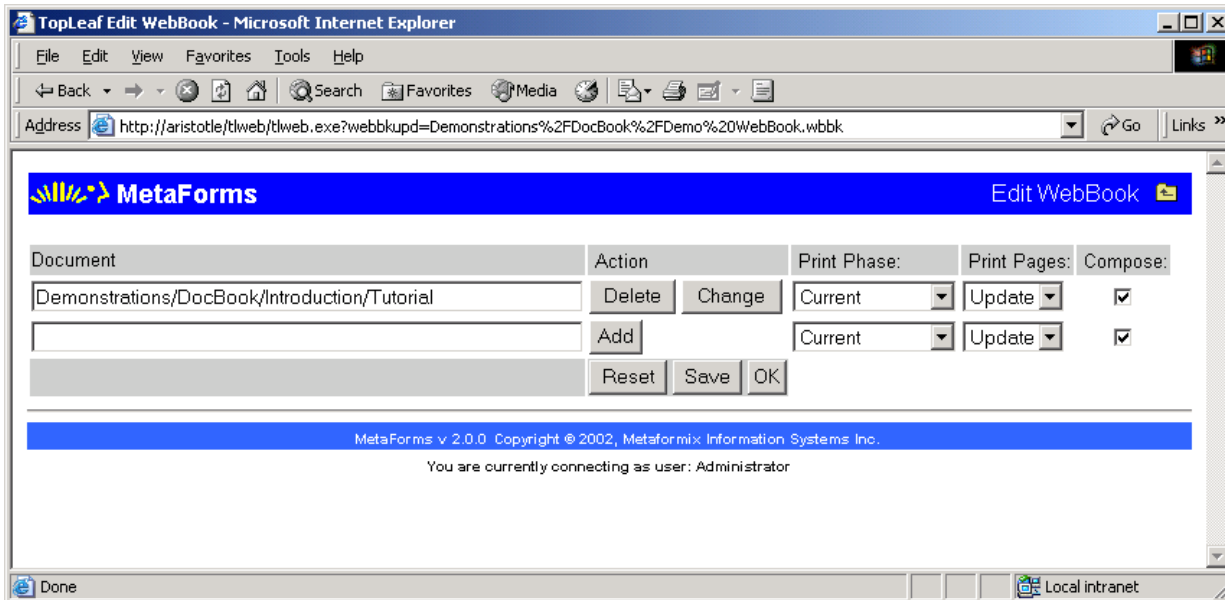
Each document you add will be assembled in the order listed in the WebBook. Click the "Add" button to open the browse/select window.

Use the browse/select window to navigate through the repository until you find the first document you want to add to the WebBook. In this example, we are adding a TopLeaf partition. (Only partitions, Word, Excel, PostScript and PDF files can be selected.)



Close the browse/select window by clicking on the "X" in the top-right corner of the window when you are done.

Click the "Save" button to save your selection into the WebBook, confirming when you are asked to do so.



At this point, you now have one partition saved in the WebBook. Click the "Add" button to repeat the process, and be sure to click "Save" after each selection.

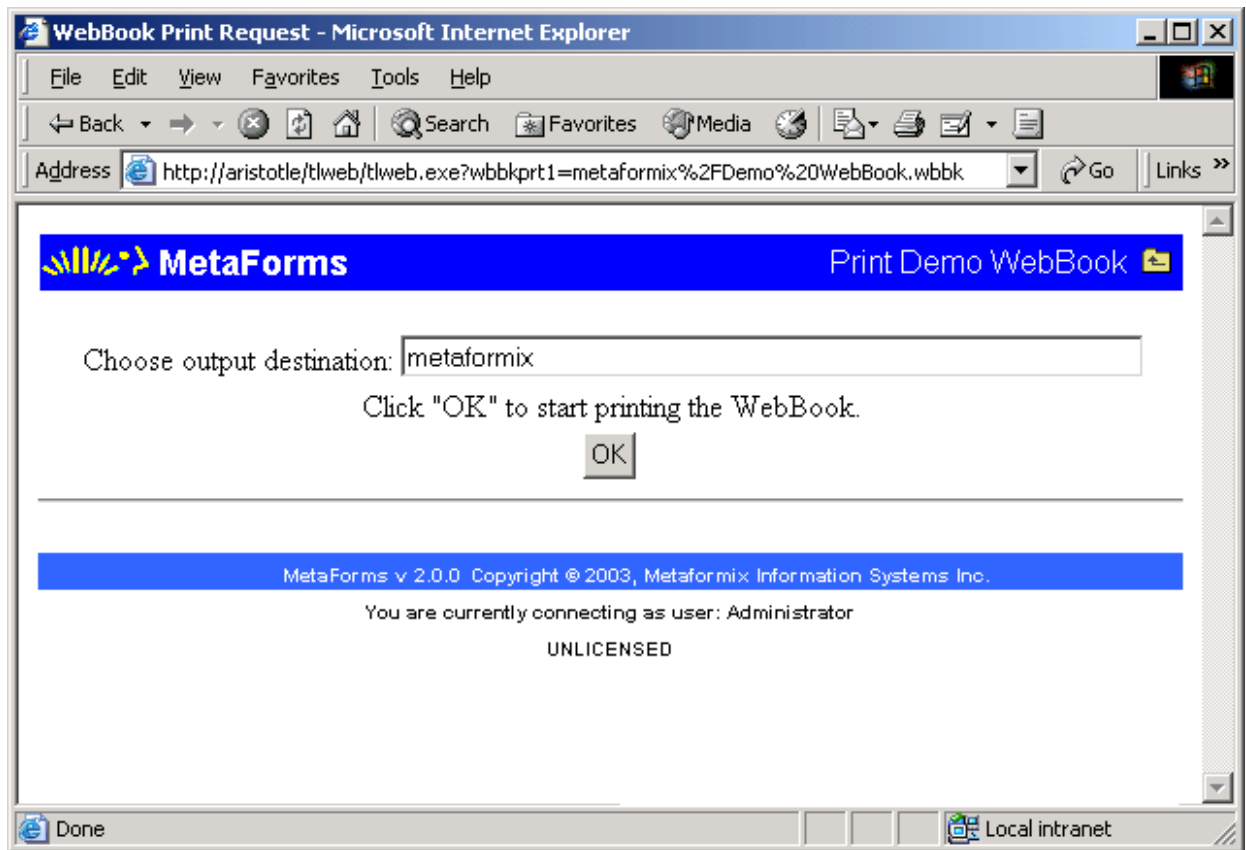
After the first entry has been saved, arrows appear to the left of the document name. These are used to move entries up or down through the list. Clicking on the up arrow swaps the associated document entry with the one above it. Similarly, clicking the down arrow swaps the associated document entry with the one below it.

When you are done adding entries to the WebBook, click "OK" to close the editor and return to the previous screen, where the WebBook is stored.

Below the list of documents is a field for selecting where the output is to be directed. By default, the output goes to the same folder as the WebBook. You can optionally choose any other location within the repository, or another network-accessible location. [NOTE: You cannot browse to choose a location outside of the repository, but if you know a valid network location, you can type the location directly into the field.

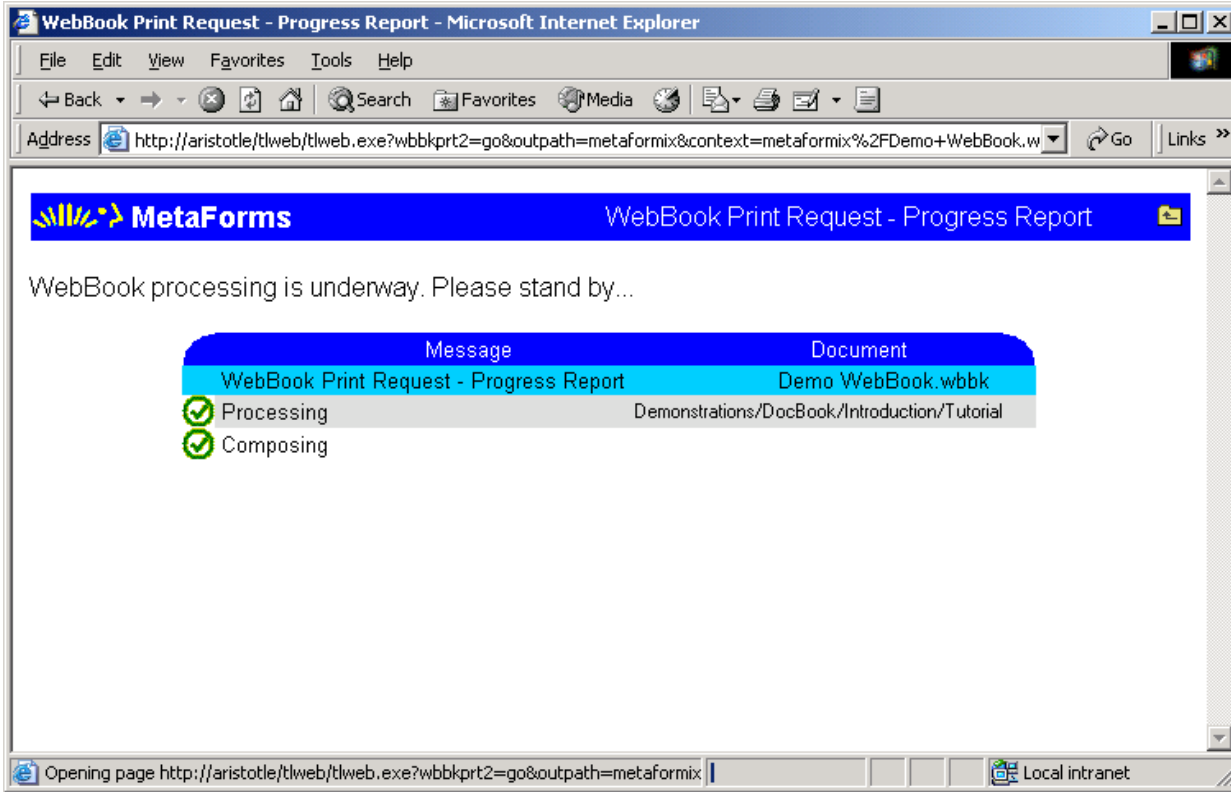
While you are editing the WebBook, you can choose a number of options for each partition document in the WebBook when the print output is generated: the TopLeaf phase you want to print, the pages to print (just update pages, or the entire partition), and whether to run TopLeaf typesetting prior to generating the printed output. Whenever you make a change in the editor, be sure to click "Save" before you click "OK".

When you are ready to create a PDF from the WebBook, select "Print" from the WebBook's "Choose" menu. The print confirmation screen appears:

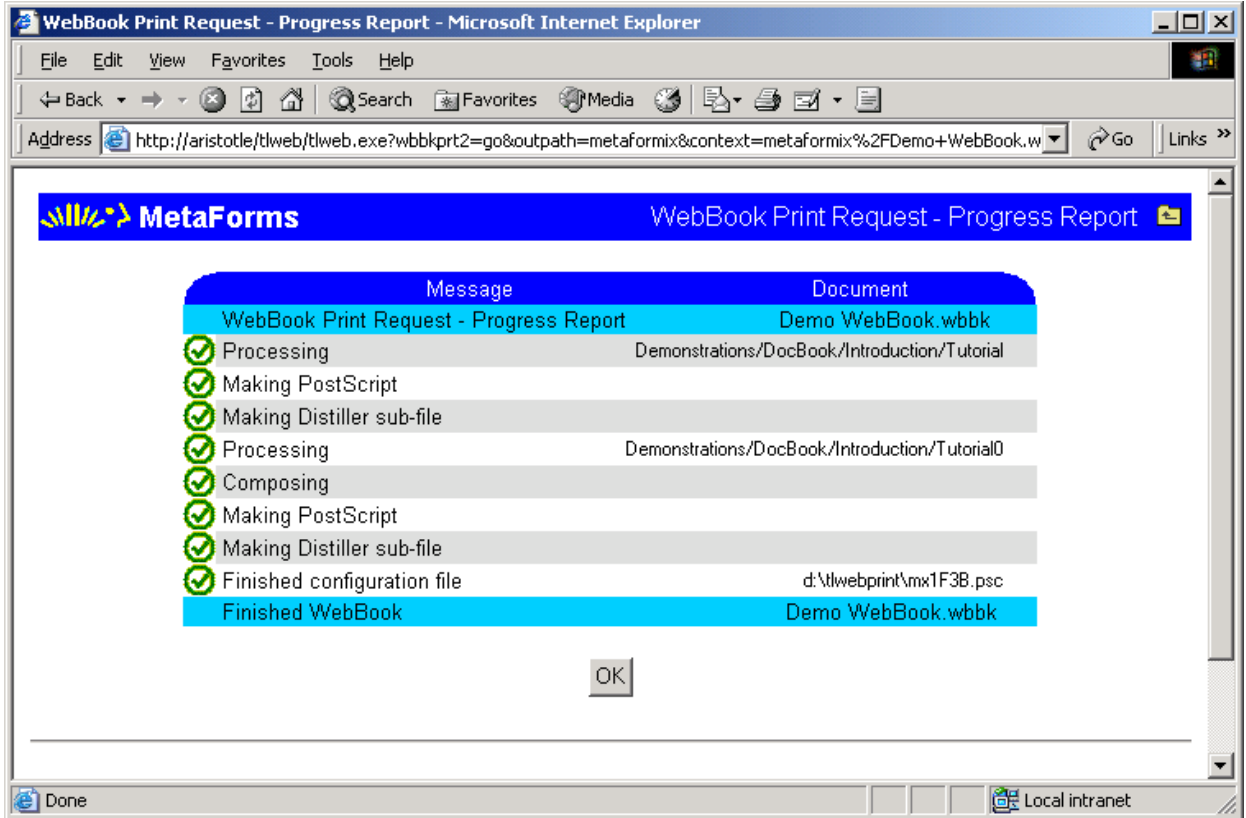


Before confirming the printing, you can elect to change the output location from that saved with the WebBook, or simply accept the value displayed.

As printing progresses, the WebBook Print Progress Status page is displayed. This page reports on each step being taken during processing, and reports any errors encountered in each document.



When printing is completed, the progress status page ends with an "OK" button.



When PDF creation is complete, the output is placed in the same location as the WebBook.





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## Where Next

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At this point, you have done the following:

- ◆ browsed the TopLeaf repository to the partition level
- ◆ viewed status information about a partition
- ◆ edited an XML document
- ◆ typeset the document through TopLeaf
- ◆ created a PDF of the typeset document.
- ◆ created a WebBook.
- ◆ created a PDF from a WebBook.

MetaForms gives you web access to most of TopLeaf's document life-cycle features, including:

- ◆ publish (freeze) a document partition
- ◆ create a new update
- ◆ cancel an update
- ◆ cancel a publish phase

Also, MetaForms lets you view and manage page status information, and partition indicators (try going to the partition status page for a partition, and looking at the "Choose" options there).

