Winlink Forms Basics

Text

How to find, install, and use Forms and Templates.

How To Use Forms in Winlink Express

- https://www.youtube.com/watch?v=SWuBmkCK_CQ

Why Use Forms?

- Simplify filling out a message in an easily repeatable way.

- Look nice.

- Easy to fill-in and create a small message.

- Recipients of a Form message can view & print from their browser.

- Standardizes message information so all messages that use the same form will look the same.

- Messages can be viewed in email clients and Winlink Express.

- Forms and Templates are completely optional.

When to Use Forms?

- Messages generated by the agency you serve:

- When you will be filling out information in the same format many times over.

- You are told to use a specific Form to send the message so that specific information is captured.

- On your own, to learn and practice!

What Is A Form?

- A single-file web page in a web browser:
  - It knows how to "talk" to Winlink Express.
  - It can format input data neatly into a Winlink message.
  - The Form can validate user input and show lists or other types of inputs.
- Winlink Express comes with Standardized Forms.
  - Already have paper ICS Forms? The Winlink Forms version will be similar if not the same.
- Forms can be customized or built from scratch:
  - Download custom Forms from other teams from Winlink.org
  - Create your own!

What Is A Form?

- Forms are composed of at least 2 files:
  - Template .txt file: ICS213.txt
  - Form "Initial" html file: ICS213_Initial.html
- Optionally a third file "Viewer" is included:
  - Form "Viewer" html file: ICS213_Initial_Viewer.html
- More about Form & Template files later.

How To Use Forms?

- Create a new Winlink or P2P or Radio Only message type.
- Select a Template and a web browser appears with the Form.
- Enter the data into the Form then click the Submit button.
    - Winlink will write the message for you using the data you entered.
    - You may need to add recipients depending on the situation.
- Post the message to the out box.

Where To Get Forms

- Go to: www.Winlink.org/WinlinkExpressForms

- Read the information on the page.

- Download Standard Templates and/or non-standard ones from the page.

- Download Template Zip file, unzip it to the Global/Templates sub-folder.

- Will appear in the "Select Template" menu.

ICS213_Input.html	HTML Document
ICS213_Input.txt	Text Document
ICS213_Viewer.html	HTML Document

How To Install Forms

- Un-Zip or Decompress the Forms Zip File(s).
- Copy the files to C:\RMS Express\Templates

This PC > Windows (C:) > RMS Express > Global Folders > Templates

Name	Date modified	Type	Size
ICS-213_TwoWay_Initial.html	9/27/2016 22:13	Chrome HTML Docu...	6 KB
ICS-213_TwoWay_Initial.txt	9/27/2016 22:13	TXT File	1 KB
ICS-213_TwoWay_Initial_Viewer.html	9/27/2016 22:13	Chrome HTML Docu...	5 KB

How To Install Forms

- Standard Forms are stored here:
  - (Local Disk) > RMS Express > Standard Templates
  - Templates too.

- Custom/Callsign Forms are stored here:
  - (Local Disk) > RMS Express > [callsign] > Standard Templates
  - Templates are stored here too.

- Do NOT launch Forms or Templates from here!
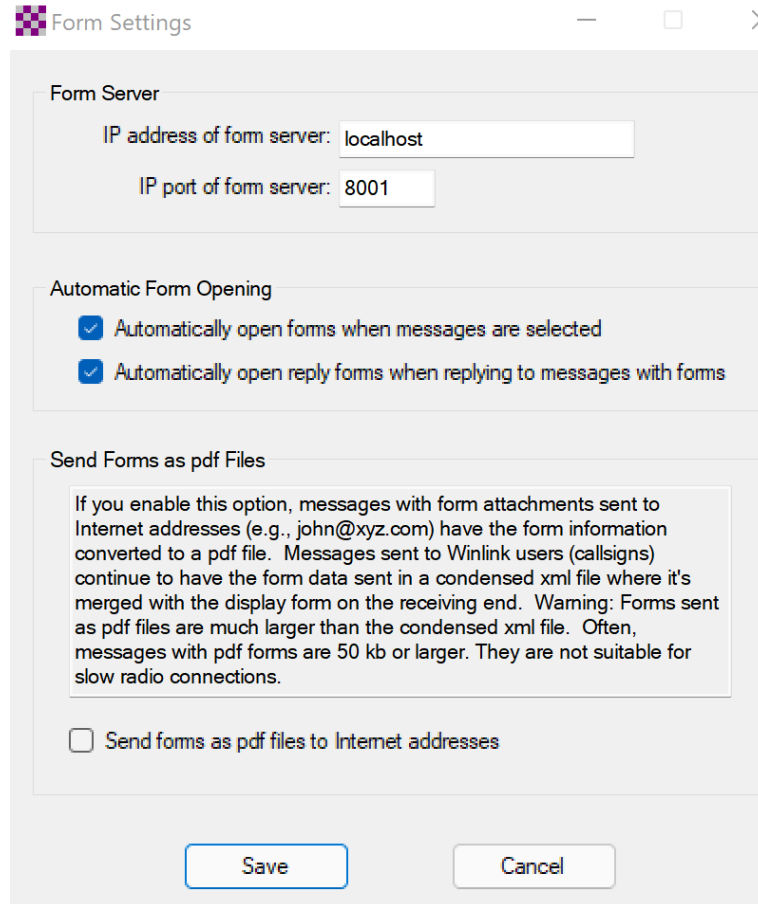 - Must be "called" by Winlink Express (the next topic).

How To Install Forms

- First ensure the Forms feature is configured:
  - Click Settings -> Form Settings
  - "localhost"; 8001; "Automatically Open Forms…"
  - **Optional**: Send forms as PDF files to internet addresses.
- Next ensure the templates you have added are in Template Manager:
  - In Express, Click Messages -> Template Manager
  - Standard Templates, Global Templates, and [callsign] Templates are shown.

Forms Settings (Optional)

- Click Messages -> Template Settings
  - Optional: Set Sequence Number (only affects certain Forms).
  - Optional: Select and enable a Default Template.
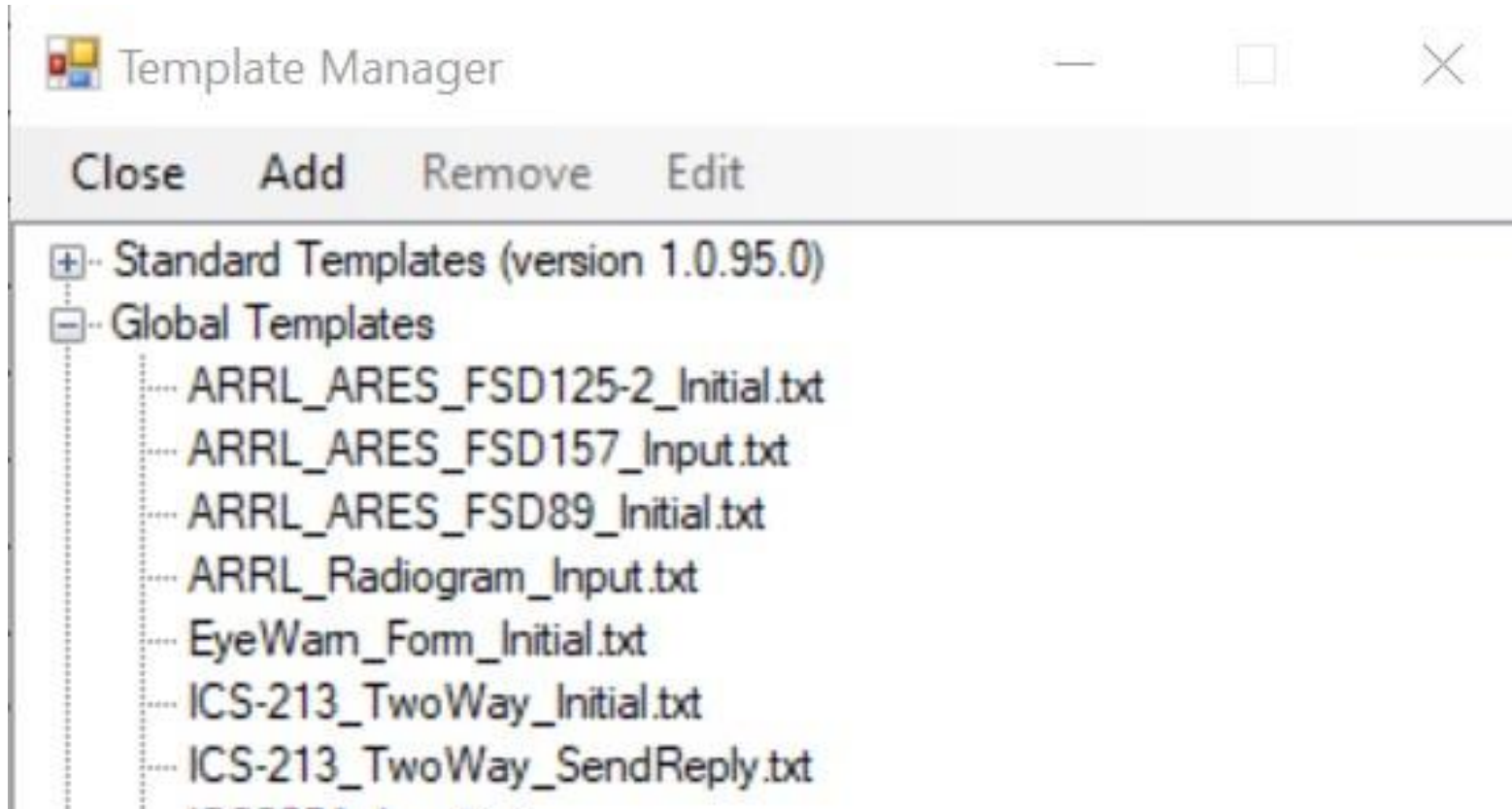
Winlink Settings -> Form Settings

Winlink Settings -> Templates

Winlink -> Message -> Template Settings

Winlink -> Message -> Set Fave Templates

Install and Configure Forms

LIVE DEMO

How To Use Forms: New Message Window

- In Winlink Express click: Message -> New Message
- Favorites are listed at the top of the message window.

How To Use Forms: Select a Template

- Messages -> New Message -> Select Template -> Select.
- The Web Browser will open the Form for you to fill out.
- Below is a partial image of what the ICS-214 Form (v3) looks like:

How To Use Forms: All Steps

- Open a new Message.

- Click "Select Template".

- Click the plus "+" symbol to expand and see more Templates.

- Click the Template you want and then click "Select".

- The Web Browser will open the Form for you.

- If you picked "Favorites", the Template name will appear along the top edge of your New Message window.

Filling Out Forms

- Fill out the form as completely as possible.
- Information to put in the form will usually be provided to you.
  - An EOC Manager, your Radio Lead, or yourself if in exercise or status report.
- Click the SUBMIT button to complete the Form.
  - You will be warned if required information is missing.
- Close the browser window, it is no longer needed.
- The new message will be filled-out and have an attachment.
- Add callsigns and Email Addresses of all recipients necessary.
- Message is ready to be saved as a draft or 'posted' to the outbox.

How To Use Forms

LIVE DEMO

Forms In Other Email Programs

- Usually the recipient(s) will be Winlink users.
  - Recipients with callsigns.
  - Browser should show the completed Form in all its glory.
- Winlink allows sending a Form message to a non-Winlink user:
  - Sends plain-text message body.
  - Adds a small attachment with metadata (form_initial_viewer.xml).
- The attachment has info that describes the Form and the Message:
  - Is NOT required for viewing the message body.
  - Winlink users benefit: Web browser uses attachment to show a pretty Form.

Forms In Other Email Programs
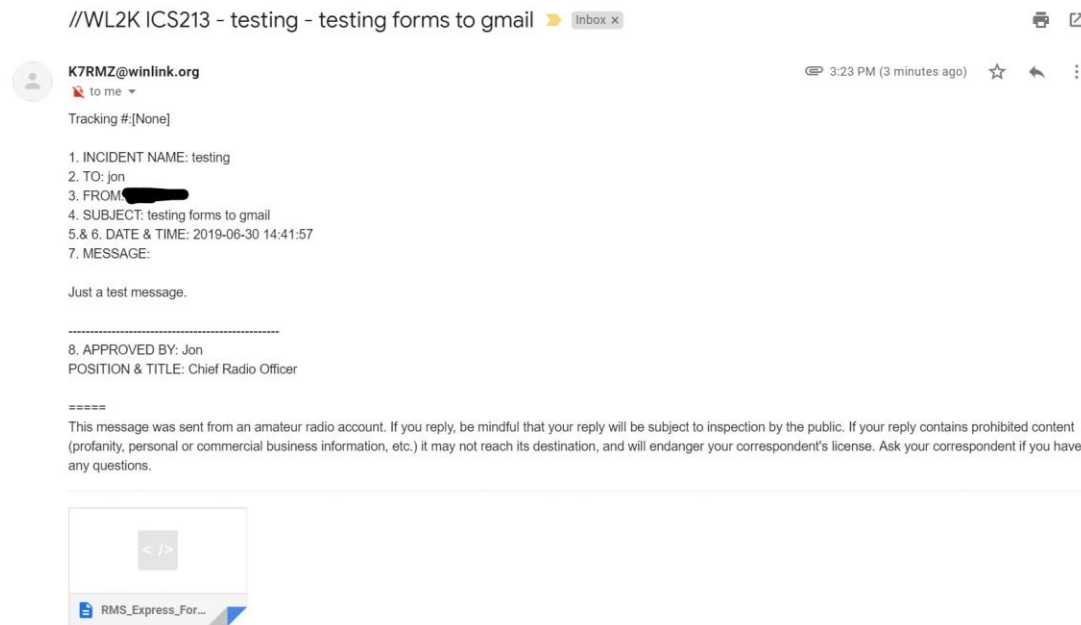
- Message FROM is callsign [at] Winlink.org.
- The numbered list contains information entered in the Winlink Form by the sender.
- The footer is added by the Winlink system.
- The attachment has the metadata.

Forms in Other Email Programs

- This is what the attachment contains: XML metadata.

- XML is used to describe the fields, a.k.a. "form data".

- There is no email header information in here.

- This will only display a pretty form in the default web browser if opened by Winlink Express.

```xml
<?xml version="1.0"?>
<RMS_Express_Form>
  <form_parameters>
    <xml_file_version>1.0</xml_file_version>
    <rms_express_version>1.5.21.0</rms_express_version>
    <submission_datetime>20190630214243</submission_datetime>
    <senders_callsign>K7RMZ</senders_callsign>
    <grid_square>CN87UT</grid_square>
    <display_form>ICS-213_TwoWay_Initial_Viewer.html</display_form>
    <reply_template>ICS-213_TwoWay_SendReply.txt</reply_template>
  </form_parameters>
  <variables>
    <msgto></msgto>
    <msgcc></msgcc>
    <msgsender>K7RMZ</msgsender>
    <msgsubject></msgsubject>
    <msgbody></msgbody>
    <msgp2p>False</msgp2p>
    <msgisreply>False</msgisreply>
    <msgisforward>False</msgisforward>
    <msgisacknowledgement>False</msgisacknowledgement>
    <msgseqnum>1</msgseqnum>
    <track>None</track>
    <incident_name>testing</incident_name>
    <to_name>jon</to_name>
    <from_name>noj</from_name>
    <subjectline>testing forms to gmail</subjectline>
    <datetime>2019-06-30 14:41:57</datetime>
    <message>Just a test message.</message>
    <approved_name>Jon</approved_name>
    <approved_postitle>Chief Radio Officer</approved_postitle>
    <submit>Submit</submit>
  </variables>
</RMS_Express_Form>
```

Templates vs. Forms

- Winlink Templates define a Winlink Message layout.
- Templates are used in conjunction with Forms.
  - Forms cannot create a Winlink message without a Template.
- Templates can be used on their own.

- If you want to send a no-frills Winlink Message that always looks the same:
  - Create a Template.
- If you want to send messages that have complex layout, colors, can be printed or converted to PDF:
  - Use an existing Form.
  - Create a custom Form + Template.

Forms and Templates Advice

- Both an be used for:
  - Messages to other Winlink stations.
  - Messages to internet email users via RMS Relays or Telnet.
  - P2P Messages to other Winlink P2P or Packet stations.
- Keep them up-to-date:
  - Automatic if connected to internet.
  - Can be manually updated: https://winlink.org/content/how_manually_update_standard_templates_version_10180

- Creating and Editing requires experience with:
  - Basic web browser operation
  - HTML & CSS
  - JavaScript
  - Winlink.org's Templating syntax
    - see TemplateHelp.txt

Thank You!

Created & Developed by Jon Rumsey K7RMZ

Some material c/o

   YouTube: K4REF; WinLink.org