

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 ▼ ↻

<input type="checkbox"/>	Name	Date modified	Type	Size
<input type="checkbox"/>	 ICS-213_TwoWay_Initial.html	9/27/2016 22:13	Chrome HTML Docu...	6 KB
<input type="checkbox"/>	 ICS-213_TwoWay_Initial.txt	9/27/2016 22:13	TXT File	1 KB
<input type="checkbox"/>	 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).

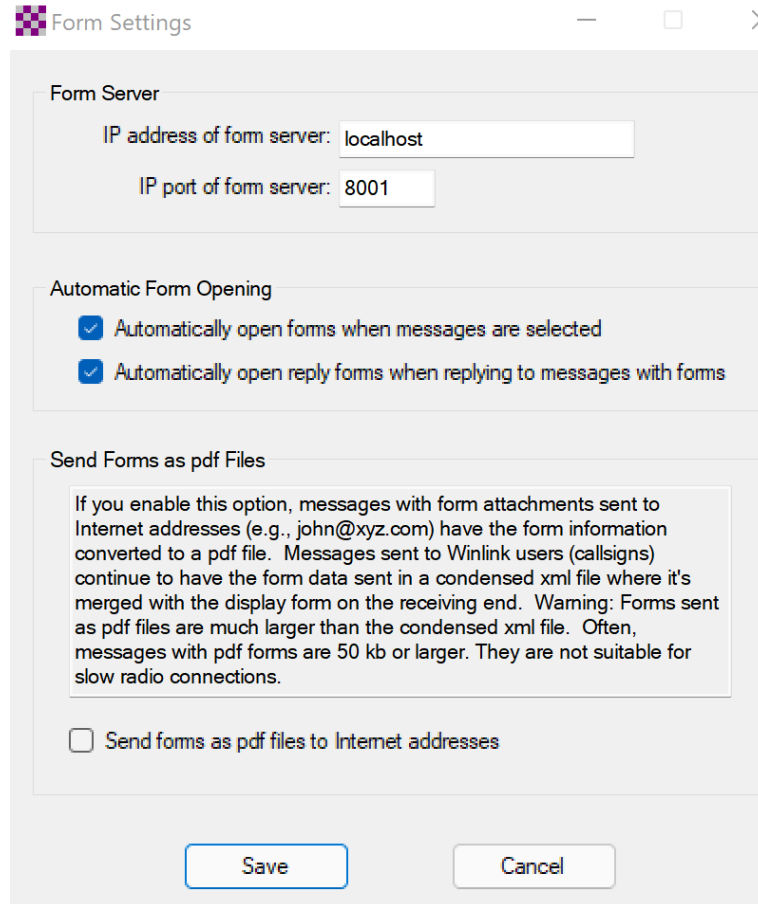
How To Install Forms

- 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

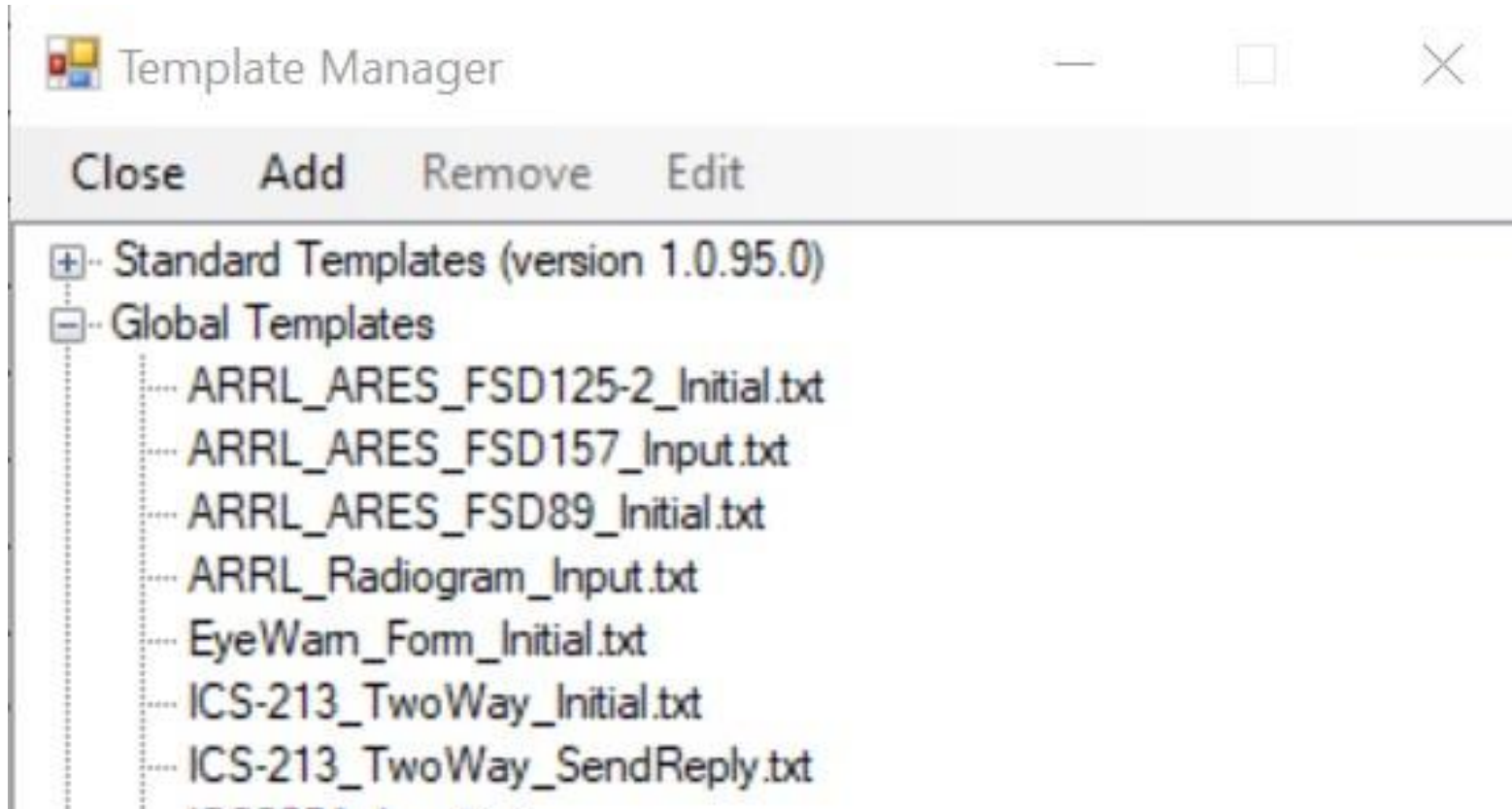


The screenshot shows a dialog box titled "Form Settings" with a purple checkered icon in the top-left corner. The dialog has standard window controls (minimize, maximize, close) in the top-right. It is divided into three sections:

- Form Server:** Contains two text input fields. The first is labeled "IP address of form server:" and contains the text "localhost". The second is labeled "IP port of form server:" and contains the text "8001".
- Automatic Form Opening:** Contains two checked checkboxes. The first is "Automatically open forms when messages are selected". The second is "Automatically open reply forms when replying to messages with forms".
- Send Forms as pdf Files:** Contains a text box with a warning message: "If you enable this option, messages with form attachments sent to Internet addresses (e.g., john@xyz.com) have the form information converted to a pdf file. Messages sent to Winlink users (callsigns) continue to have the form data sent in a condensed xml file where it's merged with the display form on the receiving end. Warning: Forms sent as pdf files are much larger than the condensed xml file. Often, messages with pdf forms are 50 kb or larger. They are not suitable for slow radio connections." Below this text box is an unchecked checkbox labeled "Send forms as pdf files to Internet addresses".

At the bottom of the dialog are two buttons: "Save" and "Cancel".

Winlink Settings -> Templates



Winlink -> Message -> Template Settings

Template Settings

Sequence Number

Sequence number: Number of digits:

Use the <seqnum> tag to insert the sequence number in a message.

Default Message Template

Set the default template to be used for messages.
You can override the default by clicking "Select Template" in the message editor.

Current default template:

Enable the default template

Winlink -> Message -> Set Fave Templates

Set Favorite Templates

Up to four favorite templates can be specified.
These templates will be shown on the message composition menu bar.

Favorite Template 1

Display name:

File name:

Favorite Template 2

Display name:

File name:

Favorite Template 3

Display name:

File name:

Favorite Template 4

Display name:

File name:

Revision: 9-Feb-22

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.

Enter a new message

Close Select Template ICS205 ICS213 RadioGram ICS214 Attachments Post to Outbox Spell Check Save in Drafts

From: K7RMZ Send as: Winlink Message Request read receipt Set Defaults

To:

Cc:

Subject:

Attach:

Revision: 9-Feb-22 18

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:

ACTIVITY LOG			ICS 214	Vers 3
1. Incident Name: <input type="text"/>				
2. Operational Period (Date/Time) From: <input type="text"/>		To: <input type="text"/>		
3. Name: <input type="text"/>		4. ICS Position: <input type="text"/>		
5. Home Agency and Unit: <input type="text"/>				
6. Resources Assigned:				
Name	ICS Position	Home Agency and Unit		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

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.

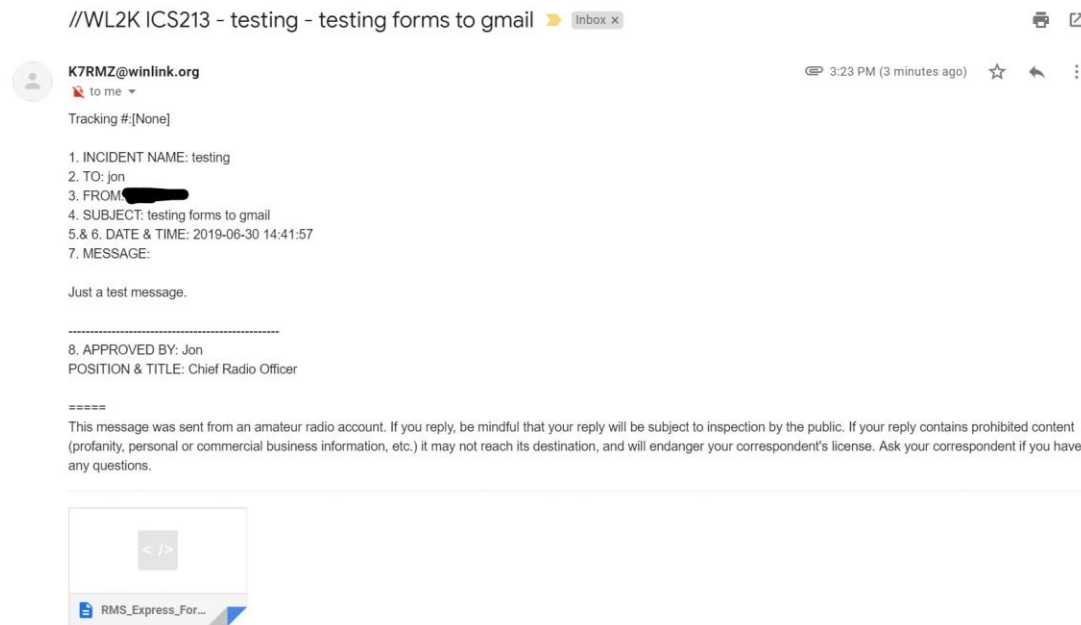
How To Use Forms

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 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 can 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