

ScanSoft®



OmniForm[®]
5.0

User's Guide for Designing and Distributing Forms

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Welcome

Welcome to OmniForm® from ScanSoft, Inc.

This user's guide is intended for the person who will be designing and delivering electronic forms with OmniForm. It provides you with installation and setup instructions, an introduction to the product, task-oriented instructions for designing and distributing forms, and technical information.

Using This Guide

This guide assumes that you are familiar with basic Windows operations and can install and set up devices such as scanners and printers. It is organized into the following chapters:

- ◆ **Chapter 1 — Installation and Setup.** Provides instructions for installing OmniForm on your computer.
- ◆ **Chapter 2 — Getting Started.** Introduces you to OmniForm, its features, and its user interface.
- ◆ **Chapter 3 — Creating Forms.** Describes how to scan, import, convert, and create forms from scratch.
- ◆ **Chapter 4 — Form Design Tools.** Describes how to use OmniForm's basic and advanced form design tools.
- ◆ **Chapter 5 — Distributing Forms.** Describes how to save forms to various formats, print forms, and mail forms for other people to fill out.
- ◆ **Chapter 6 — Publishing Forms on the Web.** Provides tips on optimizing forms for the Web, and describes how to publish your forms on the Web with ScanSoft's eOmniForm.com™ service.
- ◆ **Chapter 7 — Technical Information.** Provides troubleshooting tips.

Conventions

This user's guide uses the following conventions:

Bold text	Emphasizes new terms, commands, screen names, and headings.
<i>Italic text</i>	Emphasizes new terms, commands, screen names, and headings in callout text that accompanies graphics, as well as document names.
Note	Presents an item of additional information.
Tip	Presents ideas for using features to accomplish specific tasks.

Additional Information

In addition to this user's guide, you can use the following resources to learn about OmniForm:

- ◆ **Online Help** — Provides the most comprehensive information on OmniForm features, settings, and procedures. Choose **OmniForm Help** in OmniForm's Help menu or press the F1 key to get context-sensitive help.
- ◆ **OmniForm Filler User's Guide**— Introduces you to the basics of using OmniForm's form filling and record management tools.
- ◆ **Release Notes** — Important information about this version of OmniForm available electronically on the installation CD.
- ◆ **Product Support** — Additional technical support in the form of technical notes, frequently asked questions, software updates, and more available from the Help menu by choosing the **Product Support** command.
- ◆ **ScanSoft Web Site**— www.scansoft.com provides updated information and links to OmniForm support pages.

Chapter 1



Installation and Setup

This chapter describes how to install and get started using OmniForm software. It includes the following topics:

- ◆ System Requirements
- ◆ Upgrading from a Previous Version of OmniForm
- ◆ Installing OmniForm
- ◆ Registering Your Software with ScanSoft
- ◆ Setting up Your Scanner with OmniForm
- ◆ Starting OmniForm
- ◆ Opening a Form

System Requirements

These are the minimum system requirements to install and run OmniForm:

Note Performance and speed will be enhanced if your computer's processor, memory, and available disk space exceed the minimum requirements.

- ◆ Computer with a Pentium or higher processor
- ◆ Windows 95C, Windows 98SE, Windows 2000, Windows ME, or Windows NT 4.0
- ◆ 50MB of free hard disk space
- ◆ System memory of at least 32MB RAM
- ◆ SVGA monitor with at least 256 colors and 800 x 600 pixel resolution
- ◆ Windows-compatible pointing device
- ◆ CD-ROM drive for installation
- ◆ A compatible scanner if you plan to scan paper forms

Please see the Scanner Guide at ScanSoft's Web site (www.scansoft.com) for a list of supported scanners.

Upgrading from a Previous Version of OmniForm

If you have a previous version of OmniForm installed, it is recommended that you uninstall that version before installing your new version. To uninstall your previous version of OmniForm, please refer to the documentation that was supplied with it.

You should also back up your OmniForm forms before opening them in the new version. You can do this by saving copies of the forms in another folder location.

If you open a form from a previous version and then try to save that form, you will be prompted to update the form to the new version. This will only take a moment and will not visibly alter anything on the form itself.

Note You must update a form to the new version of OmniForm in order to take advantage of new features such as Client and User Profile fields and file attachments. However, if you do not need to use the new features, you are not required to update the form. For example, you may want to keep a form in its previous format if you still need to open the form in a previous version. If you select **No** when prompted to update your form, the form will be saved in its previous format. If you do update the form, you will no longer be able to open it in the previous version.

Installing OmniForm

OmniForm's setup program takes you through the entire installation with instructions on the screen for every step.

▼ Before installing OmniForm:

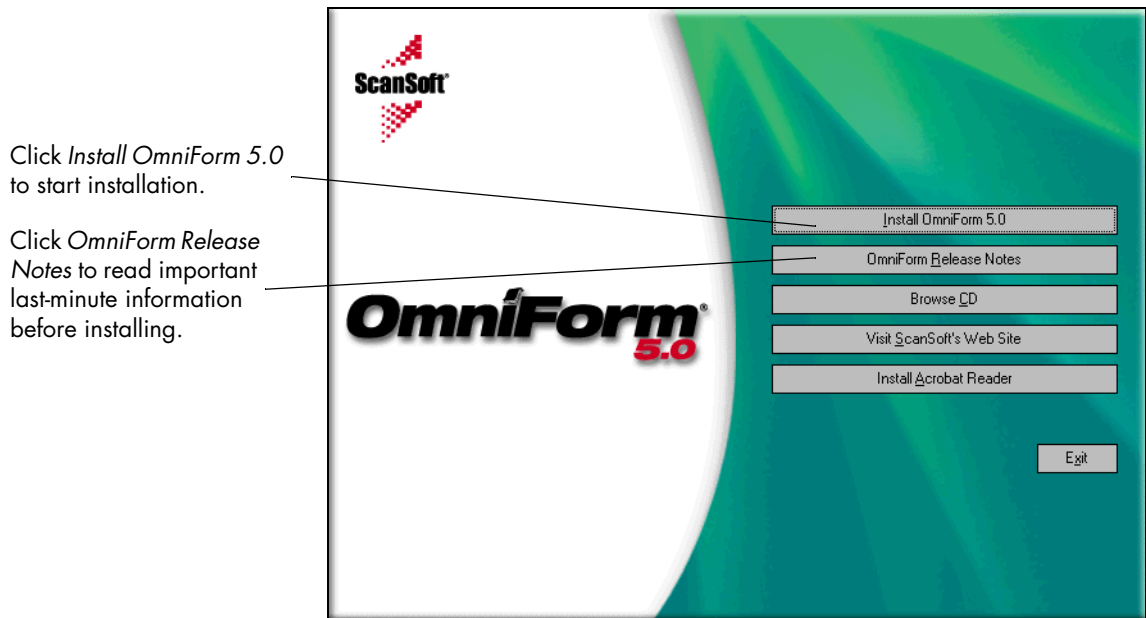
- ◆ Back up your OmniForm forms and uninstall any previous versions of OmniForm.
- ◆ Make sure your scanner is connected, turned on, and compatible with your system.
- ◆ Close all other applications, especially anti-virus software.
- ◆ Log into your computer with administrator privileges if you are installing on Windows 2000 and Windows NT.

▼ **To install OmniForm:**

1. Insert OmniForm's CD-ROM in the CD-ROM drive.

The setup program should start automatically. If it does not start, locate your CD-ROM drive in Windows Explorer and double-click the **Setup.exe** program at the top level of the CD-ROM.

The first setup screen looks like this:



2. Click **Install OmniForm 5.0** to start installation.
3. Follow the installation instructions on each screen.

By default, OmniForm files are installed in this folder location: c:\program files\scansoft\omniform. You can select a different location if desired.

Note If you experience a problem with OmniForm after installation, sometimes uninstalling and then reinstalling OmniForm will solve the problem. See Uninstalling OmniForm for more information.

Registering Your Software with ScanSoft

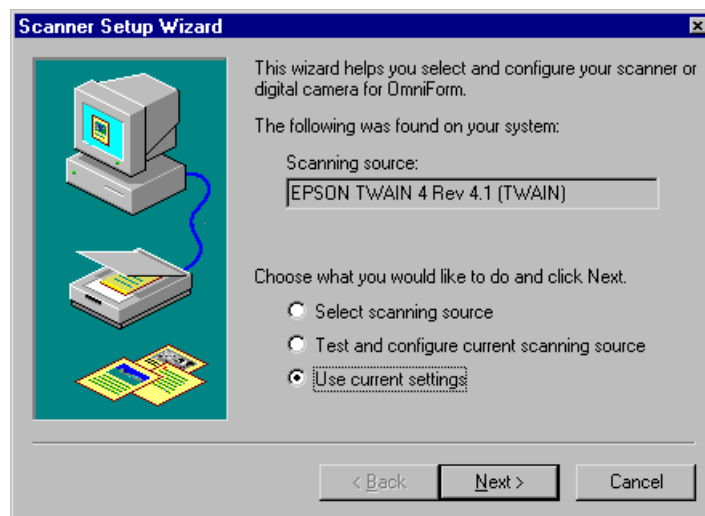
Registering OmniForm is a quick and easy process that gives you the opportunity to receive future upgrade offers for ScanSoft products. At the end of installation, ScanSoft's registration Web page automatically opens in your Web browser. To register, follow the instructions on the screen. If you do not want to register at this time, you can close your Web browser without registering.

If you do not register the software after installation, you will periodically be prompted to register as you use the software. You can also go to **www.scansoft.com** to register online anytime. Click the **Support** link, click **Register**, and then follow the online instructions to register OmniForm.

Setting up Your Scanner with OmniForm

You should install and test your scanner on your computer before installing OmniForm. After installing OmniForm, use ScanSoft's **Scanner Setup Wizard** to set up your scanner with OmniForm.

To open the Scanner Setup Wizard, choose **Select Scanner...** in OmniForm's File menu. Or, click **Start** in the Windows taskbar and choose **Programs > ScanSoft OmniForm 5.0 > Scanner Setup Wizard**. The wizard asks you questions and provides instructions as you go through each screen.



Supported Scanners

OmniForm works with many popular desktop scanners using the TWAIN interface. Supported scanners require a TWAIN source driver, which is provided by the scanner or interface card manufacturer. Please consult your scanner's documentation for details about installing your scanner, interface card, and driver.

Note The Microsoft Windows Image Acquisition (WIA) device driver interface is supported on Windows ME and Windows XP systems. If a WIA device driver is available for your scanner and you are using Windows ME or Windows XP, it is recommended that you scan using the WIA interface instead of installing the TWAIN driver. If you are using Windows ME, you might not need to install the software that came with your scanner.

Please check ScanSoft's Web site, www.scansoft.com, for the latest list of supported scanners. Click **scanner guide** from the ScanSoft home page.

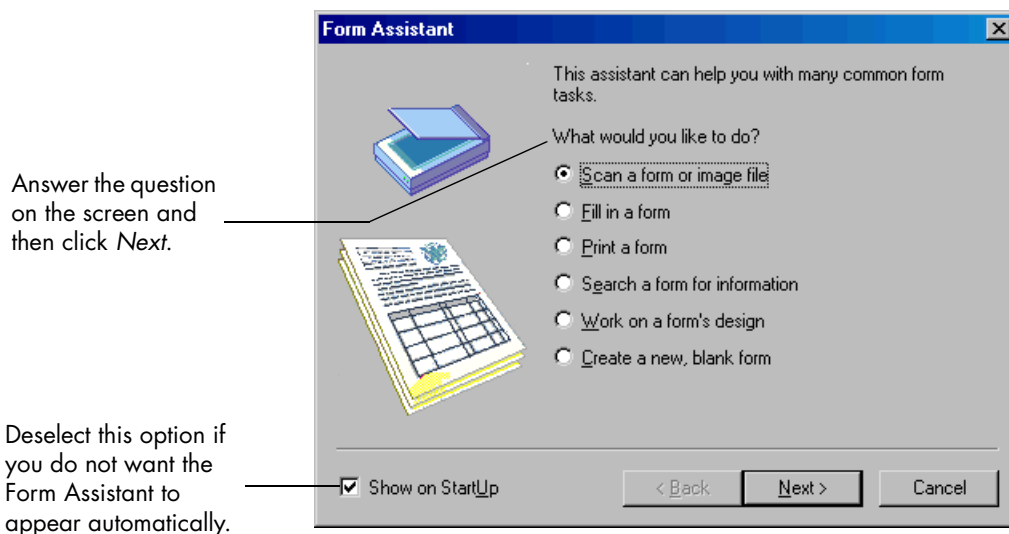
Starting OmniForm

▼ **To start OmniForm, do one of the following:**

- ◆ Click **Start** in the Windows taskbar and choose **Programs > ScanSoft OmniForm 5.0 > OmniForm 5.0**.
- ◆ Double-click the OmniForm icon in the program's installation folder.



By default, a helpful wizard called the **Form Assistant** appears when you open OmniForm. You can use the Form Assistant to get step-by-step guidance for accomplishing various OmniForm tasks, such as scanning in a paper form.



Please read Chapter 2 for an introduction to OmniForm and its features.

Opening a Form

If you have forms from a previous version of OmniForm, you can open them in this version. OmniForm also has a number of sample forms that you can open in the **Sample Forms** folder. The Sample Forms folder location depends on your operating system. The very first time you use the Open command, OmniForm defaults to this folder.

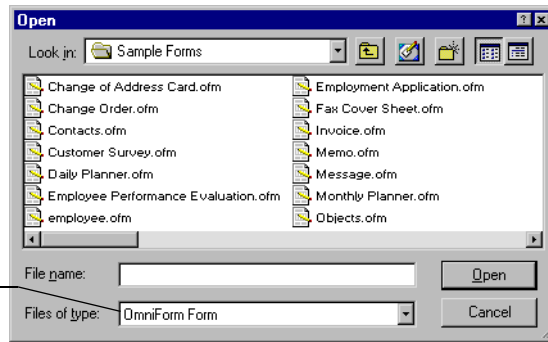
▼ To open a form:

1. Open OmniForm.
2. Click the **Open** button in the design toolbar or choose **Open...** in the File menu.



The Open dialog box appears.

Make sure *OmniForm Form* is selected as the file type.



3. Locate and select the form you want to open.
4. Click **Open**.

The form opens and you can now work on its design, fill it out, or publish it to the Web. See Chapter 4 for information on form design. See the *OmniForm Filler User's Guide* for information on filling forms. See Chapter 6 for information on Web publishing.

Chapter 2



Getting Started

This chapter introduces you to OmniForm and its key features. It includes the following topics:

- ◆ What is OmniForm?
- ◆ What is New in OmniForm 5.0?
- ◆ OmniForm Desktop
- ◆ Form Assistant
- ◆ Elements You Can Include on Your Form
- ◆ Designer Toolkit
- ◆ Proofreader

What is OmniForm?

OmniForm is a complete solution for creating, filling, and managing electronic forms. It is the easiest way to convert your paper forms, design new forms, distribute forms in a variety of formats, fill out forms, maintain form records in a searchable database, and publish forms on the Web.



What is New in OmniForm 5.0?

This section highlights OmniForm's major new features.

New User Interface with Tabbed Views

OmniForm now has three tabbed views so you can easily switch between the Form Designer, Form Filler, and new Online Forms view. For more information, see page 20.

Publish Forms on the Web with eOmniForm.com

OmniForm's new Online Forms view allows you to instantly publish your forms on the Web using eOmniForm.com, ScanSoft's online forms hosting service. This is a great way to publish your forms on a secure (SSL-based) Web site without any complicated setup. For more information, see Chapter 6.

Automatic Filling with User and Client Profiles

OmniForm's new User Profile and Client Profile features save you lots of time by automatically filling out repetitive information on forms for you. A User

Profile remembers information about you and your business. Client Profiles remember information about other people, such as your customers or employees. For more information, see the *OmniForm Filler User's Guide*.

Add Attachments to Filled Forms

You can now include file attachments with your filled forms. For example, you may want to attach scanned receipts to your expense forms. For more information, see the *OmniForm Filler User's Guide*.

New Level of Digital Signature Protection

OmniForm now offers two levels of signature protection to lock down data on a form and protect it from unauthorized modification. The most secure level of protection requires additional digital signature software from service providers such as Entrust or Microsoft PKI. The next level of protection, OmniForm signatures, work with a user database. For more information, see page 77.

Mailable Filler Available in Two File Formats

OmniForm's Mailable Filler format allows you to send forms to people who do not have OmniForm. You can now deliver Mailable Filler in HTML format in addition to an executable file. If a recipient's email system does not allow executable file attachments, the HTML version can be used instead. For more information, see page 91.

Improved HTML Conversion (available only with OmniForm Premium)

OmniForm has improved HTML capabilities. It now automatically converts circle text fields to radio buttons when you save forms to HTML. It also improves the way converted forms appear and function in many Web browsers, including Netscape.

Intelligent PDF Support (available only with OmniForm Premium)

OmniForm now preserves calculations and field validations when you save forms in PDF format.

Custom Page Sizes

OmniForm now allows you to create custom form sizes up to 14 x 17 inches.

Save Export Settings

You can now save time by saving and reusing your export selections whenever you export data from OmniForm. For more information, see OmniForm's Help.

OmniForm Desktop

The OmniForm desktop has three tabbed views that allow you to easily click between **Form Designer**, **Form Filler**, and **Online Forms**.

- ◆ Use the **Form Designer** to work on scanned forms, create new forms from scratch, and modify an existing form's design.
- ◆ Use the **Form Filler** to fill out new form records and search through your form's database.
- ◆ Use the **Online Forms** view to instantly publish and manage forms on the Web using eOmniForm.com.

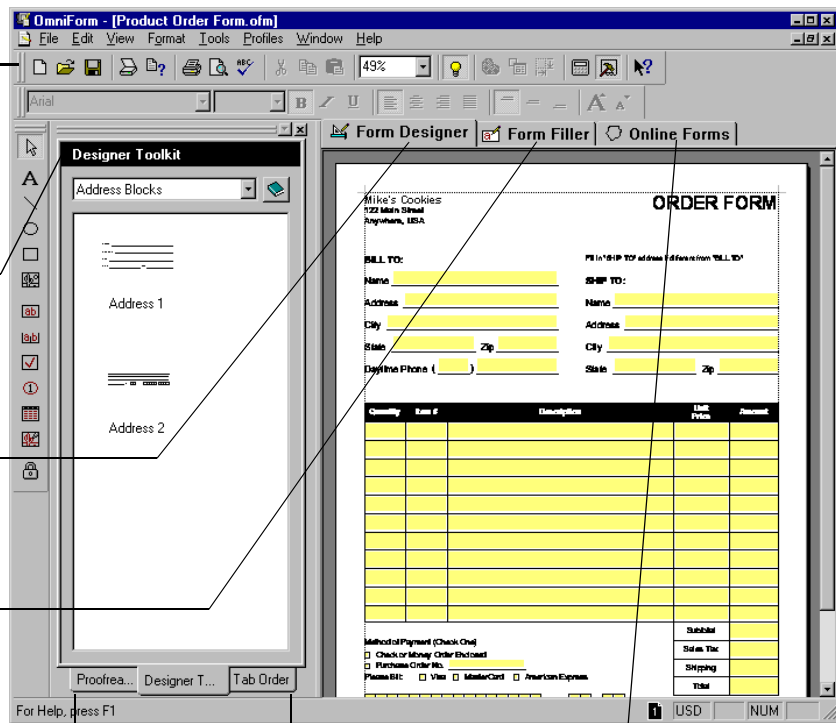
The tools available on the OmniForm desktop depend on the current view. This is the design toolbar.

The Designer Toolkit is available when the Form Designer is open. You can copy its pre-designed form elements into your form.

Click *Form Designer* to go into design mode.

Click *Form Filler* to go into filling mode.

Click these tabs to switch between the Proofreader, Designer Toolkit, and Tab Order tools when you are in the Form Designer.



Click *Online Forms* to publish and manage your forms on the Web with eOmniForm.com. (You must be connected to the Internet to work in this mode.)

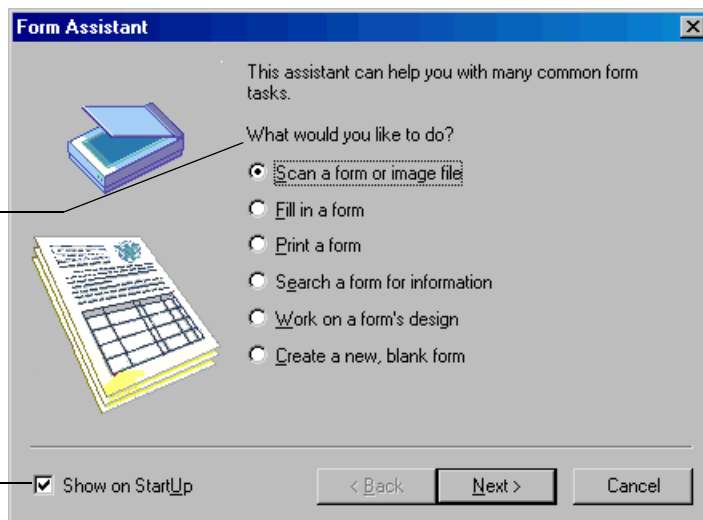
Form Assistant

Use the Form Assistant to get step-by-step guidance for accomplishing various OmniForm tasks, such as scanning in a paper form.

The Form Assistant appears by default whenever you open OmniForm. You can also open it by choosing **Form Assistant...** in the File menu.

Answer the question on the screen and then click *Next*.

Deselect this option if you do not want the Form Assistant to appear automatically.



Elements You Can Include on Your Form

OmniForm allows you to create many different types of fields and other elements on a form. The following illustration shows an example of some of the common elements you can add to your forms.

The illustration shows an 'ORDER FORM' for Diamond Mike Cookie Co. The form includes the following elements:

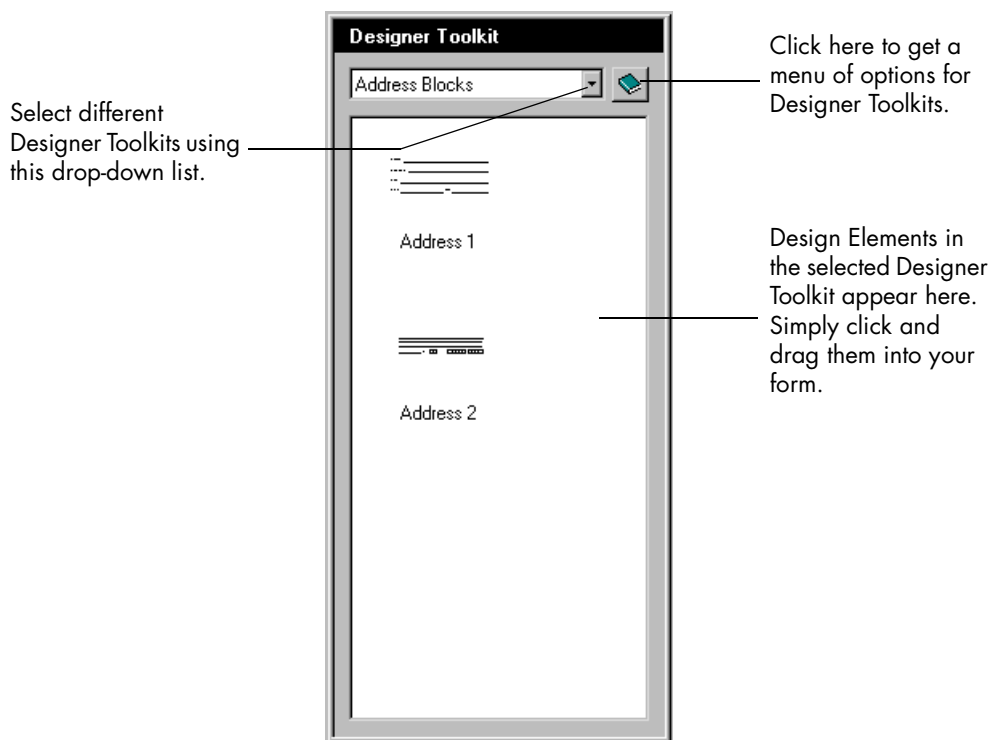
- fixed graphic** (see page 49): A diamond-shaped logo.
- fixed text** (see page 42): The company name and address: "Diamond Mike Cookie Co., 122 Main Street, Anywhere, USA".
- fillable text fields** (see page 42): Fields for "BILL TO:" (Name, Address, City, State, Zip, Daytime Phone) and "SHIP TO:" (Name, Address, City, State, Zip).
- circle text** (see page 45): Radio buttons for "Yes" and "No" to the question "Would you like to be added to our mailing list?".
- table with fillable text fields** (see page 46): A table with 5 columns: Quantity, Item #, Description, Unit Price, and Amount. It contains 10 rows for item entry.
- check boxes** (see page 44): Check boxes for "Visa", "MasterCard", and "American Express" under the "Please Bill:" section.
- comb field** (see page 43): A dropdown menu for "Method of Payment" with "Credit Card" selected.
- signature field** (see page 78): A long horizontal line for the "Authorized Signature".
- drop-down list** (see page 68): A dropdown menu for "Expiration Date" with "MM - YY" selected.
- auto-calculation field** (see page 74): A table on the right side with rows for "Subtotal", "Sales Tax", "Shipping", and "Total", where the "Total" row is an auto-calculation field.

Designer Toolkit

Use OmniForm's Designer Toolkit for assistance when you are working on a form's design. The Designer Toolkit contains commonly used, predesigned form elements that you can easily copy or drag into your own form.

OmniForm offers a number of different Designer Toolkits, including Address Blocks, Graphics, and Special Fields. You can also create your own Designer Toolkit and store elements that you have designed yourself.

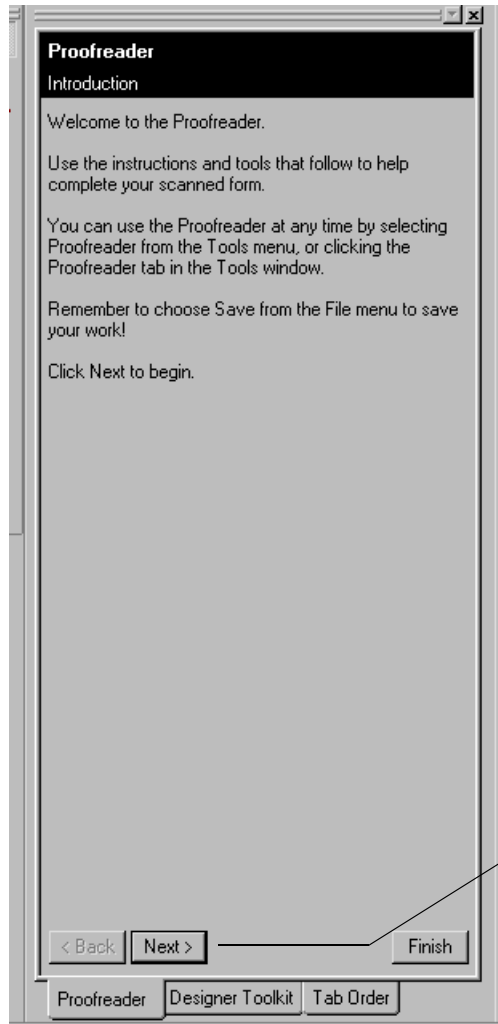
You can open the Designer Toolkit by choosing **Designer Toolkit** in the Tools menu when Form Designer is open.



For more information, see page 38.

Proofreader

Use OmniForm's Proofreader to correct and perfect your forms. By default, you will be asked if you want to use the Proofreader whenever you scan or import a form image. You can also open the Proofreader by choosing **Proofreader...** in the Tools menu.



Click *Next* to go to the next Proofreading screen.

Chapter 3



Creating Forms

This chapter describes the different ways you can create electronic forms with OmniForm. It includes the following topics:

- ◆ Scanning and Converting Paper Forms
- ◆ Importing and Converting Image Files
- ◆ Creating Brand New Forms
- ◆ Creating Forms with Templates
- ◆ Converting Forms from Other Applications
- ◆ Saving Forms as You Work

Note For information on designing form elements, such as creating specific form fields, please see page 37.

Scanning and Converting Paper Forms

You can scan black-and-white and color forms directly into OmniForm if you have a supported scanner. OmniForm works with many popular desktop scanners using the TWAIN interface. For more information on setting up your scanner with OmniForm, see page 13. For the latest list of supported scanners and other scanner information, please go to ScanSoft's Web site, www.scansoft.com, and click **scanner guide**.

Note For best results, paper forms should be blank (without handwriting) and have crisp, dark text. For more tips on improving scanning performance, see page 118.

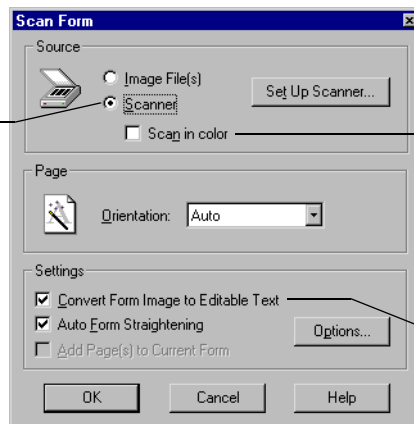
▼ To scan a paper form:

1. Place your paper form in your scanner.
2. Click the **Scan** button or choose **Scan Form...** in the File menu.



The Scan Form dialog box appears. You can select different options for scanning the form within this dialog box. For detailed information on scanning options, click **Help** in the dialog box.

Select this to scan a paper form.

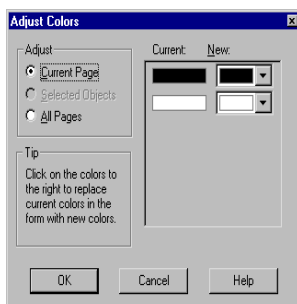


Select this option if you are scanning a form that contains color (text or background) and you want to keep the color. Otherwise, the form will be scanned in black and white.

Select this option if you want OmniForm to convert the form image to an electronic form that can be edited and filled. Otherwise, it will only bring in a picture of the form.

3. Select **Scanner** in the Source box.

4. Click **Set Up Scanner...** and then select a page size and adjust the scanning brightness in the Set Up Scanner dialog box.



5. Click **OK** to return to the Scan Form dialog box.
6. Select the desired options in the **Page** box and the **Settings** box.

To convert your form image to editable text and fillable fields, select **Convert Form Image to Editable Text**. Deselect this option if you only want to produce a “picture” of the form for filling, printing, or mailing purposes.

7. Click **OK** in the Scan Form dialog box to begin scanning.

OmniForm displays the progress as it scans and converts your paper form. When it is finished, the converted form appears in the Form Designer.

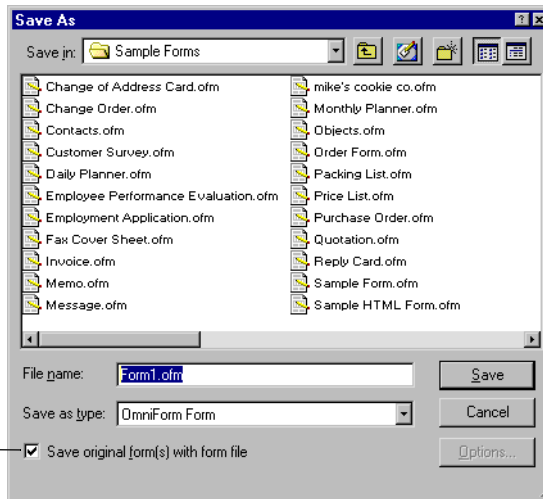
Note Some scanners display their own user interface when you scan from OmniForm. If a dialog box automatically appears for your scanner, use it to select the desired options and start scanning.

By default, the Proofreader window appears after scanning. This gives you options for correcting and perfecting your form. For more information on using the Proofreader, see page 39.



8. Click the **Save** button or choose **Save...** in the File menu to open the Save As dialog box.

Select this option if you want to retain the scanned picture along with your converted form.



9. Select a file location, enter a file name for your form, and click **Save**.

The form is now ready for you to fill out. For more information, please see the *OmniForm Filler User's Guide*.

You can also modify the form's design. For more information, please read Chapter 4 .

Note Color forms use more disk space than black-and-white forms. If you scanned a color form and are concerned about the amount of disk space you might use, do not save the color form image with the file. Deselect **Save original form(s) with form file** in the Save As dialog box.

Importing and Converting Image Files

You can import an image file of a form into OmniForm and convert it to an OmniForm form. This process is very similar to converting a scanned form.

OmniForm can import and recognize black-and-white and 24-bit color forms in either PCX or TIFF format. OmniForm automatically detects color and black-and-white forms when processing an image file. Image resolution must be 200, 300, or 400 dots per inch (DPI) for black-and-white forms, and 300 DPI for color forms. For example, if you have a fax modem you can receive a faxed form and use the fax program's software to save the file in PCX or TIFF format.

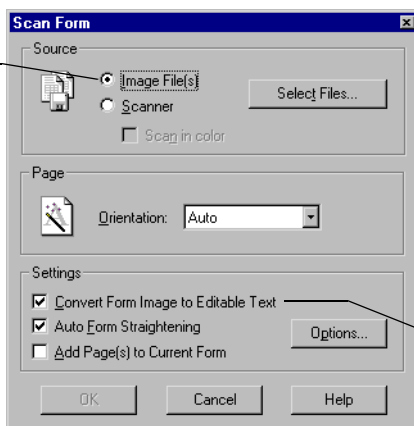
▼ To import and convert an image file:



1. Click the **Scan** button or choose **Scan Form...** in the File menu.

The Scan Form dialog box appears. For detailed information on the options in this dialog box, click the **Help** button.

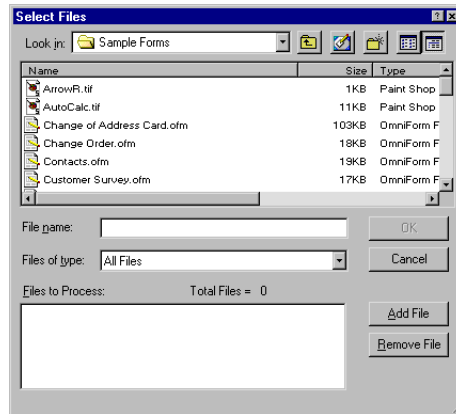
Select this option to import an image file.



Select this option if you want OmniForm to convert the form image to an electronic form that can be edited and filled. Otherwise, it will only bring in a picture of the form.

2. Select **Image File(s)** in the Source box.

3. Click **Select Files...** to open the Select Files dialog box so you can specify the files you want to import.



4. Locate and select the file you want to import.

Image resolution must be 200, 300, or 400 dots per inch (DPI) for black-and-white forms, and 300 DPI for color forms.

5. Click **Add File** to add the selected file to the **Files to Process** list box.

6. Repeat steps 4 and 5 for any other files you want to import.

All the files that you select will be combined into one, multiple-page form.

7. Click **OK** to return to the Scan Form dialog box.
8. Select the desired options in the **Page** box and the **Settings** box.
9. Click **OK** to import the selected files.

OmniForm displays the progress as it converts the selected files. When it is finished, the converted form appears in the Form Designer.

By default, the Proofreader window appears after scanning. This gives you options for correcting and perfecting your form. For more information on using the Proofreader, see page 39.



10. Click the **Save** button or choose **Save...** in the File menu to open the Save As dialog box.

11. Select a file location and enter a file name for your form and click **Save**.

The form is now ready for you to fill out. For more information, please see the *OmniForm Filler User's Guide*.

You can also modify the form's design. For more information, please read Chapter 4.

Creating Brand New Forms

This section describes how to create a brand new form. Please also read Chapter 4 for detailed information on using OmniForm's design tools for creating specific form elements.

▼ To create a new form:



1. Click the **New** button or choose **New** in the File menu.

A blank form opens in the Form Designer.

2. Choose **Page Setup...** in the File menu to set dimensions, margins, and orientation options for your form.
3. Use OmniForm's design tools to create fields and other desired design elements on your form.

For information on designing and modifying form elements, please read Chapter 4.

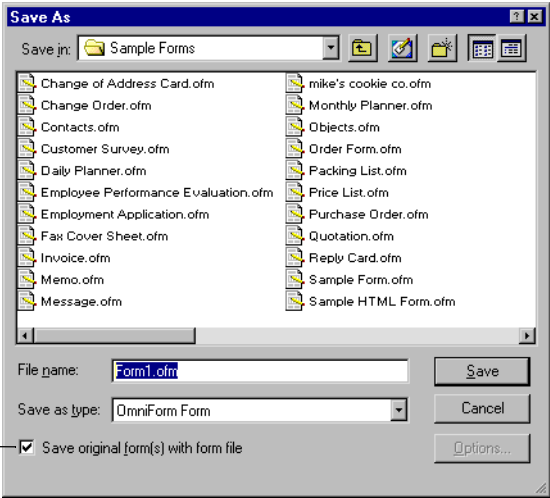
Note You can easily copy predesigned form elements from the Designer Toolkit into your form. Choose **Designer Toolkit** in the Tools menu to open it. See page 38 for more information.



4. Click the **Save** button or choose **Save** in the File menu to save your new form.

You are prompted to give your form a name and select a file location for it.

Select this option if you want to retain the scanned picture along with your converted form.



Creating Forms with Templates

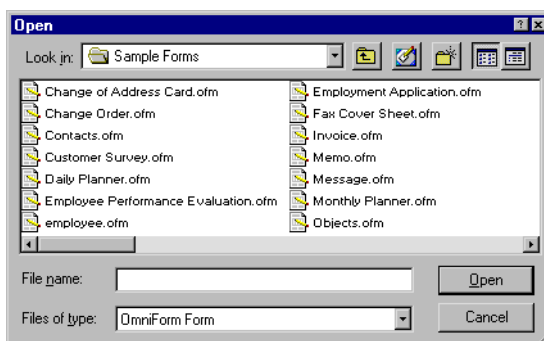
OmniForm provides many different sample forms that you can use as templates for your own forms. Open a form that is similar to the form that you want to create, and modify it as necessary.

▼ To create forms from a template:



1. Click the **Open** button or choose **Open...** in the File menu.

The Open dialog box appears.



2. Locate the **Sample Forms** folder and select a form that you want to use as a template.

The Sample Forms folder location depends on your operating system. The very first time you use the Open command, OmniForm defaults to this folder.

3. Click **Open** to open the selected form.
4. Use OmniForm's design tools to modify the form as desired.

For information on designing and modifying form elements, please read Chapter 4.

5. Choose **Save As...** in the File menu to save your form with a different file name.
6. Select a file location and enter a file name for your form and click **Save** in the Save As dialog box.

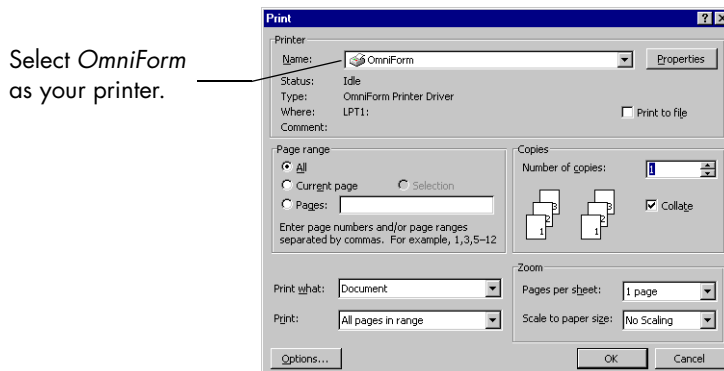
Converting Forms from Other Applications

You can use the OmniForm print driver to convert an electronic form from any Windows application directly into OmniForm. During this process, OmniForm converts the form to an OmniForm form.

▼ To convert a form from another application:

1. Make sure OmniForm is running. It will not launch automatically.
2. Open the form in the application in which it was created.
3. Remove any colored or shaded background from the form.
4. Choose **Print** in the application's File menu to open its Print dialog box.

For example, this is the Print dialog box for Microsoft Word.



5. Select **OmniForm** as the printer.
6. Click **OK**.

OmniForm automatically prints the form to a file and then converts it to an OmniForm form. When it is finished, the converted form appears in the Form Designer.

By default, the Proofreader window appears after scanning. This gives you options for correcting and perfecting your form. For more information on using the Proofreader, see page 39.



7. Click the **Save** button or choose **Save...** in the File menu to open the Save As dialog box.
8. Select a file location and enter a file name for your form and click **Save**.

The form is now ready for you to fill out. For more information, please see *OmniForm Filler User's Guide*.

You can also modify the form's design. For more information, please read Chapter 4.

Saving Forms as You Work

Click the **Save** button or choose **Save...** in the File menu to save changes to a form as you work on it in Form Designer. Choose **Save As...** in the File menu when you want to save a form to another location or with a different file name.

Chapter 4



Form Design Tools

This chapter describes how to use OmniForm's **Form Designer** tools to design and edit forms. For the most detailed information on form design, please refer to OmniForm's online Help.

Basic Design topics:

- ◆ Using the Designer Toolkit
- ◆ Using the Proofreader
- ◆ Creating Elements on Your Form
- ◆ Adding Graphics to Your Form
- ◆ Modifying Form Elements
- ◆ Setting the Tab Order on Forms
- ◆ Adding Color to Forms

Advanced Design topics:

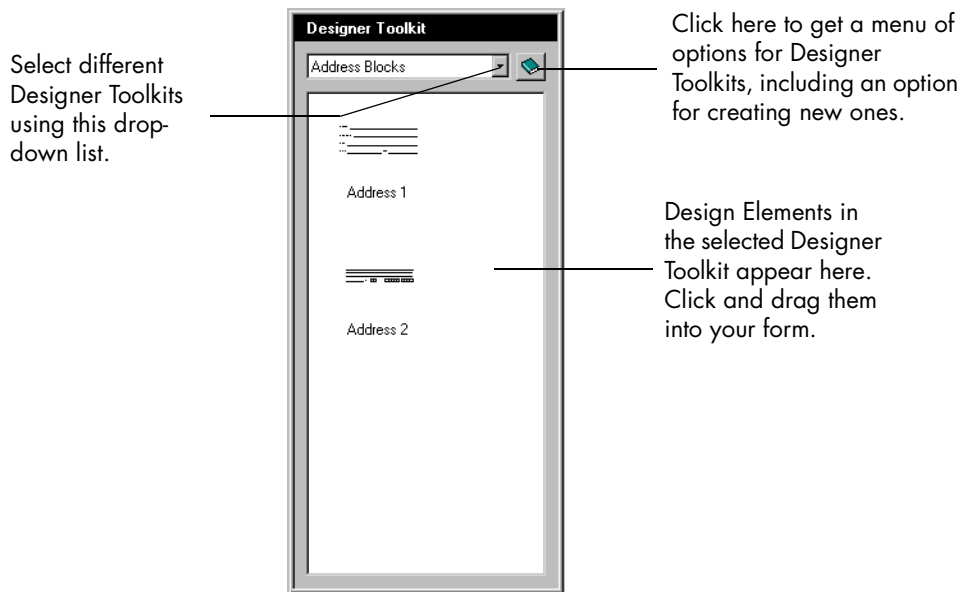
- ◆ Adding Hyperlinks
- ◆ Inserting Objects
- ◆ Setting Up User Profile Fields
- ◆ Setting Up AutoFill Fields
- ◆ Using Calculations in Fields
- ◆ Setting Up Field Validation
- ◆ Adding Security to Forms with Digital Signatures
- ◆ Protecting Form Design and Data

Using the Designer Toolkit

OmniForm's Designer Toolkit contains predesigned, commonly used form elements that you can easily copy or drag into your own form. You can also create your own Designer Toolkit and store elements that you have designed yourself.

▼ To open the Designer Toolkit and copy design elements into your form:

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Designer Toolkit** in the Tools menu.



3. Use the drop-down menu to select the particular Designer Toolkit you want to use.
4. Select a design element and drag it into your form.

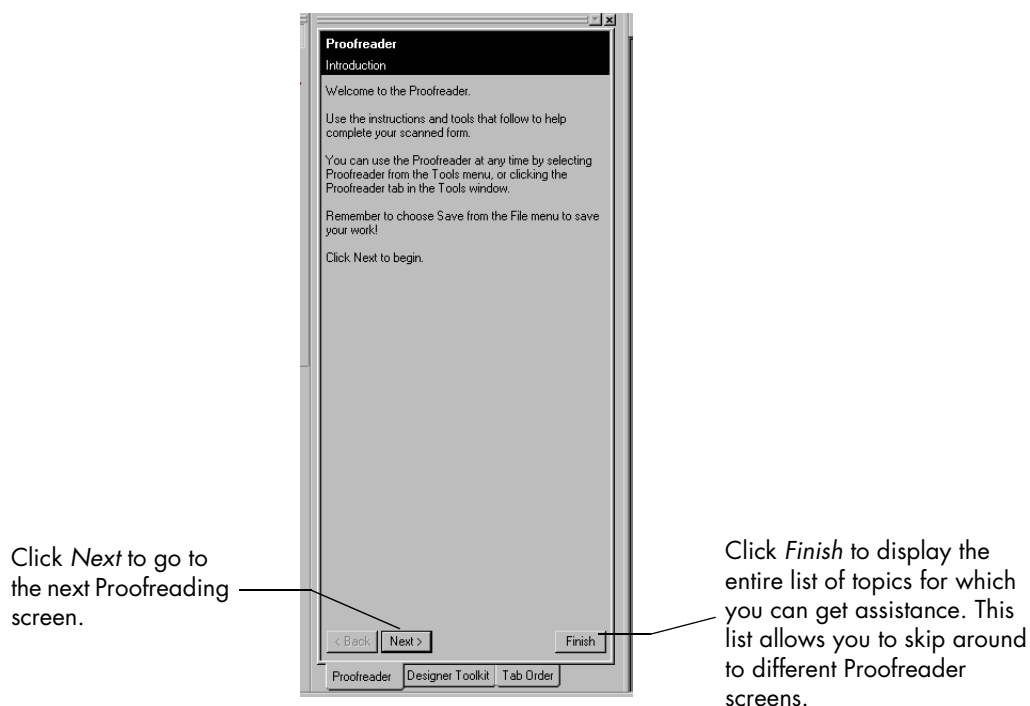
See OmniForm's Help for more information on working with Designer Toolkits and creating your own Designer Toolkit.

Using the Proofreader

OmniForm's Proofreader helps you correct and perfect your forms. The Proofreader has 10 separate screens that assist you in areas such as spelling, color adjustment, text formatting, and field tabbing.

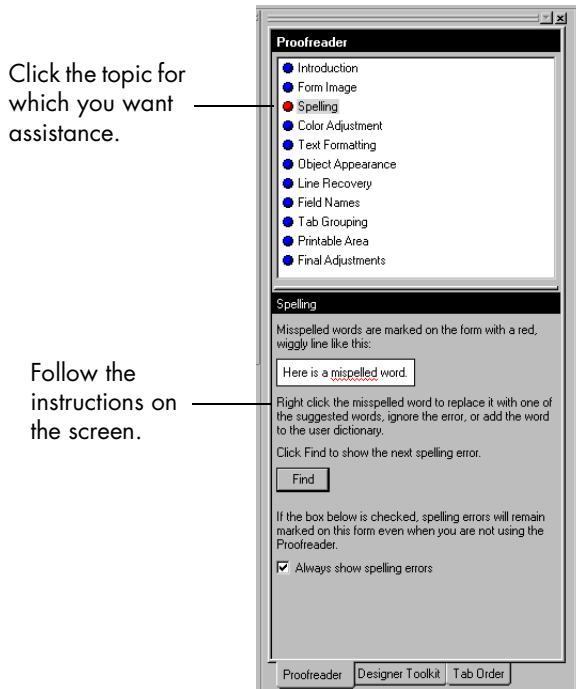
▼ **To open and start using the Proofreader:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Proofreader...** in the Tools menu.



3. Click **Next** to go to the next Proofreader screen.

Or, click **Finish** to display an indexed Proofreader panel that displays all the topics in the Proofreader.



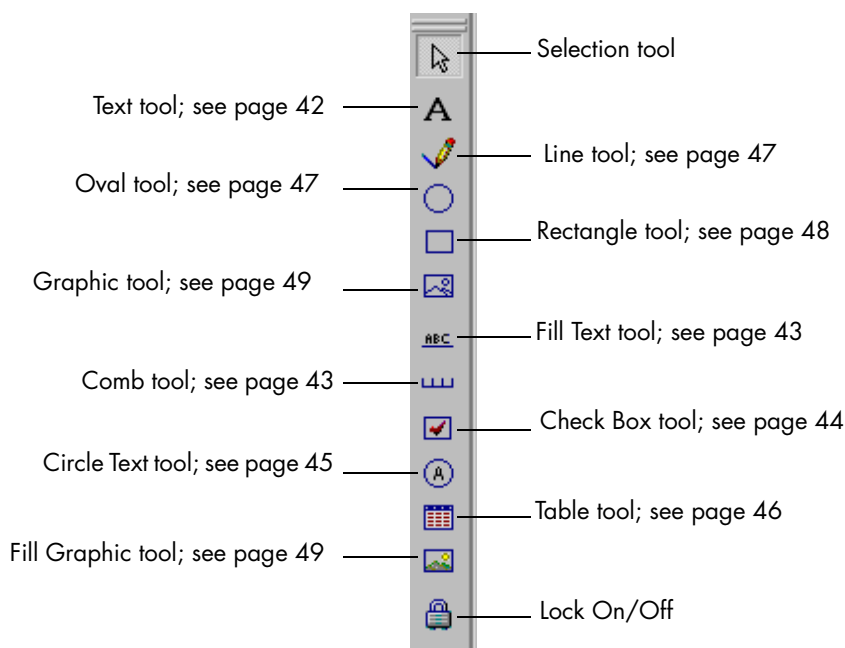
4. Click any topic in the indexed list to receive assistance for that particular topic.

For example, click **Spelling** to open the Proofreader screen that offers spelling assistance.

5. Follow the instructions that appear on the screen for the current topic.

Creating Elements on Your Form

This section explains how to use OmniForm's drawing tools to create elements on your form. OmniForm's drawing toolbar appears when a form is open in Form Designer. Use the drawing toolbar to create and select objects.



Tip

As form elements are created, they are automatically given default field names such as **Table1**. It is recommended that you give each element a more specific name, such as **InventoryList**, so you can identify elements more easily. You can rename a selected element by choosing **Object Definition...** in the Format menu and clicking the **Properties** tab.

Creating Text Elements

Use a text element to add fixed text descriptions on your form such as titles, labels, and headers.

fixed text — Name 

▼ To create a text element:



1. Click the Text tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the text element.
3. Hold down the mouse button and drag the tool until the text element is the desired size.

When you release the mouse button, the default text *Label* appears.

4. While the text element is still selected, type the text that you want to replace the word *Label*.

You can specify the text formatting by choosing **Font...** in the Format menu. Choose **Text...** in the Format menu if you want to specify text alignment, spacing, margins, or text flow.



Tip

After drawing a form element, the drawing tool reverts to the Selection tool unless the Lock On/Off tool is on.

Creating Fillable Text Fields

Use fillable text fields for areas where you want people to enter text on the form. Fillable text fields are commonly used for information such as name, company, address, and comments.

Name  — fillable text field

▼ To create a fillable text field:



1. Click the Fill Text tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the fillable text field.
3. Hold down the mouse button and drag the tool until the field is the desired size.
4. Choose **Object Definition...** in the Format menu to define the fillable text field. See OmniForm's Help for more information on defining this kind of element.

You can specify the way entered text will be formatted by choosing **Font...** in the Format menu. Choose **Text...** in the Format menu if you want to specify text alignment, spacing, margins, or text flow.

Creating Comb Elements

Use a comb element to create a fillable text field that is separated into different boxes for entering information. For example, forms used in the United States typically require that you enter zip code numbers in five or nine separate boxes.

Zip Code: -

▼ To create a comb element:



1. Click the Comb tool in the drawing toolbar.
2. Click anywhere on the form to instantly create a four-element comb field. Or, hold down the mouse button and drag the tool to draw a comb field of the desired size.

The number of elements in the comb field increases as you drag the tool.

3. Let go of the mouse button when the comb field contains the number of elements that you want.
4. Choose **Object Definition...** in the Format menu to define the comb element. See OmniForm's Help for more information on defining this kind of element.

Creating Check Boxes

Use check boxes for Yes/No questions and for selecting one or more choices on a form. A filled check box field can contain a check mark, an **X**, or a solid fill.

You can define three different types of fill options for check boxes.

Yes ☒ No ☐

Yes ☒ No ☐

Yes ☒ No ☐

▼ To create a check box:



1. Click the Check Box tool in the drawing toolbar.
2. Click anywhere on the form to start drawing a check box.
3. Hold down the mouse button and drag the tool until the check box is the desired size.

To create a perfect square, hold down the Shift key as you draw.

4. Choose **Object Definition...** in the Format menu to define the check box element. See OmniForm's Help for more information on defining this kind of element.

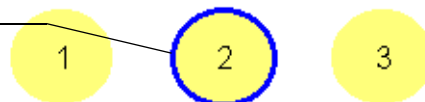
Tip

You can group check boxes so that only one can be selected at a time when filling the form. To group check boxes this way, select them all and then choose **Object Definition...** in the Format menu. Click the **Properties** tab and type in a name for the option group.

Creating Circle Text Elements

Use circle text elements for *Yes/No* questions and for selecting one or more choices on a form. When a user clicks a circle text element on the form, a circle appears around the text.

After a user clicks the text on a form, a circle appears around it to indicate the selection.



▼ To create a circle text element:



1. Click the Circle Text tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the circle text element.

To create a perfect circle, hold down the Shift key as you draw.
3. Hold down the mouse button and drag the tool until the circle is the desired size.

When you release the mouse button, a number appears inside the circle.

4. With the circle text element still selected, type in the text that you want to replace the number.
5. Choose **Object Definition...** in the Format menu to define the circle text element. See OmniForm's Help for more information on defining this kind of element.

Tip

You can group circle text elements so that only one can be selected at a time when filling the form. To group circle text elements this way, select them all and then choose **Object Definition...** in the Format menu. Click the **Properties** tab and type in a name for the option group.

Creating Tables

Use tables for areas where you want people to enter blocks of information.

A table consists of cells and a header. Each cell contains a fillable text element by default. Headers contain fixed text elements by default.

Sold To:
Company Name:
Name:
Address:
City, State, Zip

▼ To create a table element:



1. Click the Table tool in the drawing toolbar.
2. Click anywhere on the form to instantly create a table. Or, hold down the mouse button and drag the tool to draw a table of the desired size. The number of rows and columns in the table increase as you drag the tool.

To create a perfectly square table, hold down the Shift key as you draw.

3. Let go of the mouse button when the table contains the number of rows and columns that you want.
4. Choose **Object Definition...** in the Format menu to define the table. See OmniForm's Help for more information on defining this kind of element.

Creating Lines

Use lines as design elements to distinguish different sections of a form.

Lines distinguish separate areas

FAX Cover Sheet

[Your Company Name]
[Company Address]
[City, State Zip]

[Phone Number]
[FAX Number]

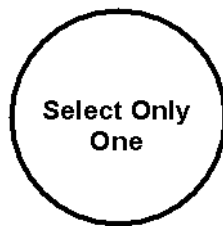
▼ **To create a line:**

1. Click the Line tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the line.
3. Hold down the mouse button and drag the tool until the line is the desired size.

To create a perfectly straight horizontal or vertical line, hold down the Shift key as you draw.

Creating Ovals

Use ovals as design elements to highlight areas on a form.

▼ **To create an oval:**

1. Click the Oval tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the oval.
3. Hold down the mouse button and drag the tool until the oval is the desired size.

To create a perfect circle, hold down the Shift key as you draw.

4. Select the oval and use the **Send to Back** command in the Format menu if the oval is blocking the item, such as text, that it is supposed to be highlighting.

Creating Rectangles

Use rectangles as design elements to highlight areas on a form.



▼ To create a rectangle:



1. Click the Rectangle tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the rectangle.
3. Hold down the mouse button and drag the tool until the rectangle is the desired size.

To create a perfect square, hold down the Shift key as you draw.

4. Select the rectangle and use the **Send to Back** command in the Format menu if the rectangle is blocking the item, such as text, that it is supposed to be highlighting.

Creating Fillable Graphic Elements

Use a fillable graphic element to allow the person filling the form to insert a graphic. For example, a real estate form might require a picture of the property. You can design the form with a fillable graphic element so that someone filling the form can insert a picture.

Insert a picture of the property:



After a user clicks the fillable graphic field, they are prompted to select a source for the graphic.

▼ To create a fillable graphic element:



1. Click the Fill Graphic tool in the drawing toolbar.
2. Click anywhere on the form to start drawing the fill graphic element.

To create a perfect square, hold down the Shift key as you draw.
3. Hold down the mouse button and drag the tool until the fillable graphic element is the desired size.
4. Choose **Object Definition...** in the Format menu to define the fillable graphic. See OmniForm's Help for more information on defining this kind of element.

Adding Graphics to Your Form

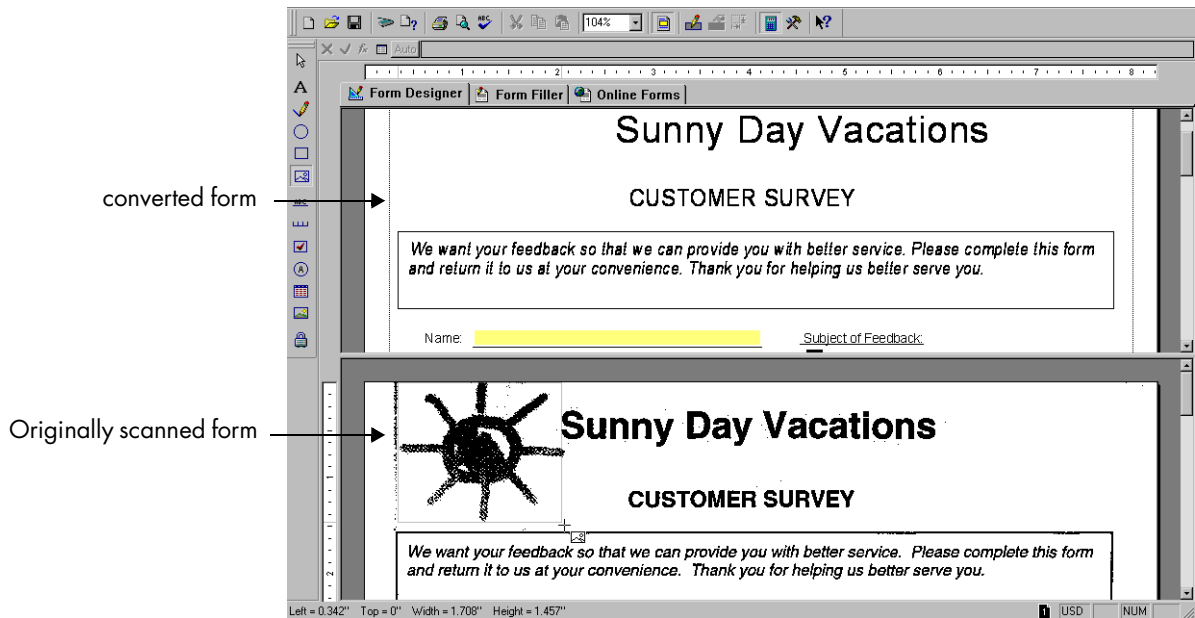
You can add pictures, such as your company logo, to a form by copying, importing, or scanning graphics.



▼ To copy a graphic from your originally scanned form:

1. Choose **Form Image** in the View menu.

The screen splits to show both the originally scanned form and the converted form.



2. Click the Graphic tool in the drawing toolbar.
3. Select any area of the scanned form that you want to bring in as a graphic by holding down the mouse button and dragging the cursor around the area.
4. Let go of the mouse button.

The selected area appears as a graphic in your converted form.

5. Drag the graphic to the desired location in the form.

▼ To import a graphic into your form:



1. Click the Graphic tool in the drawing toolbar.
2. Hold down the mouse button and drag the tool until you create a space for your graphic that is the desired size.

The Graphic Definition dialog box appears after you let go of the mouse button.

3. Select **Graphic File** in the **Source** drop-down list.
4. Type the folder location and file name of the graphic you want to import in the **File Name** text box. Or, click **Browse...** to locate the file.
5. Select other desired options in the Graphic Definition dialog box.

Click **Help** to get more information each on option.

6. Click **OK**.

The selected file appears on your form.

▼ To scan a graphic into your form:



1. Click the Graphic tool in the drawing toolbar.
2. Hold down the mouse button and drag the tool until you create a space for your graphic that is the desired size.

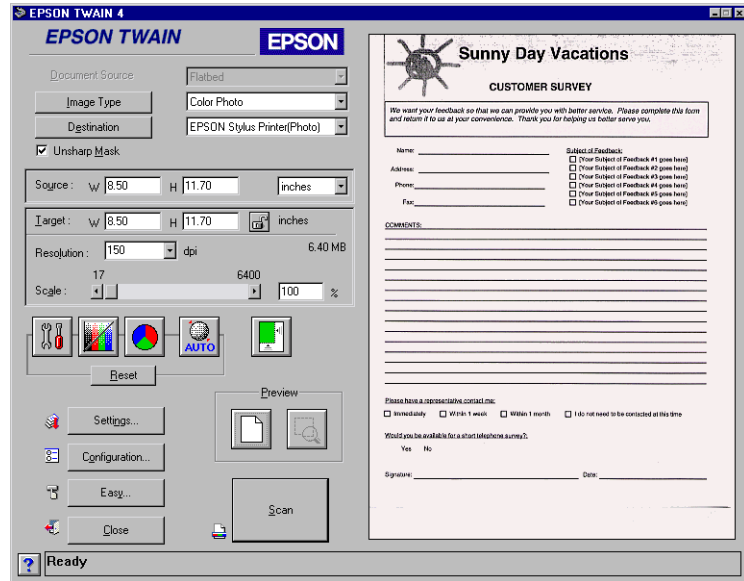
The Graphic Definition dialog box appears after you let go of the mouse button.

3. Place the item you want to scan in your scanner.
4. Select **Twain** in the **Source** drop-down list.
5. Select other desired options in the Graphic Definition dialog box.

Click **Help** to get more information about each option.

6. Click **OK** to start scanning.

If a separate scanning interface for your scanner appears, use the controls in that interface to start scanning. The next illustration, for example, shows the Epson TWAIN 4 scanning interface.



After scanning, the graphic appears in the area specified on your form.

Modifying Form Elements

After creating elements on your form, you can move them around, align them, resize them, change their definition, and change their appearance.

This section provides an overview of modifying an element's definition and appearance to affect how it functions and looks. For complete information on modifying form elements, see OmniForm's Help.

▼ Defining a form element allows you to:

- ◆ Give it a unique name that is useful when sorting or searching records, arranging tab order, defining calculations, and setting up User Profile fields.
- ◆ Provide filling options such as a list of possible entries and help messages that appear in Form Filler.

- ◆ Set validation options such as whether a field must be filled or can be skipped.

▼ **To modify the definition of a form element:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select the element you want to define.

You can only define fillable elements such as fillable text fields.



3. Click the Object Definition button in the design toolbar or choose **Object Definition...** in the Format menu.

The dialog box that appears varies depending on the selected element. Click **Help** in the dialog box for more information on available options.

4. Make the desired selections and then click **OK**.

▼ **To modify the appearance of a form element:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select the element you want to modify.



3. Click the Object Appearance button in the design toolbar or choose **Object Appearance...** in the Format menu.

The dialog box that appears varies depending on the selected element. Click **Help** in the dialog box for more information on available options.

4. Make the desired selections and then click **OK**.

Setting the Tab Order on Forms

Tab order is the order in which the cursor moves from field to field as you fill out a form. You should check the tab order on all the forms you create.

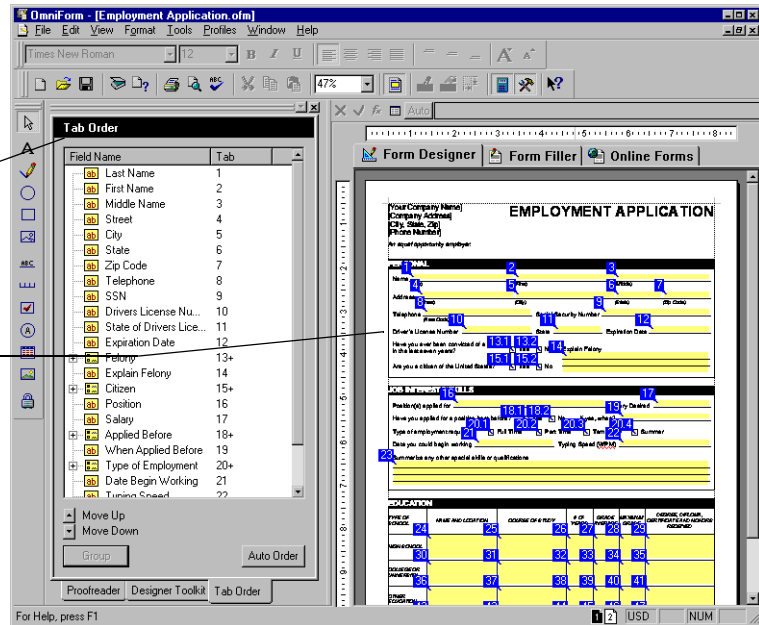
▼ **To check and change the tab order on a form:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Tab Order** in the Tools menu.

The Tab Order window lists all fillable fields on the form by name in their current tab order. Numbers also appear next to each field on the form to indicate the tab order.

The Tab Order window lists all the fields on the form in their current tab order.

Tab numbers appear next to each field on the form.



3. Select a field you want to reorder in the Tab Order window or on the form.
4. Reorder the selected field in one of the following ways:
 - ◆ Drag the fields up or down in the Tab Order window.
 - ◆ Select a field and click the **Move Up** or **Move Down** button in the Tab Order window.
 - ◆ Select the tab numbers on the form and enter a new order number.
 - ◆ Click **Auto Order** to have OmniForm reorder all the fields on the form for you. It generally reorders fields from top to bottom and left to right.
5. Close the Tab Order window when you are finished.

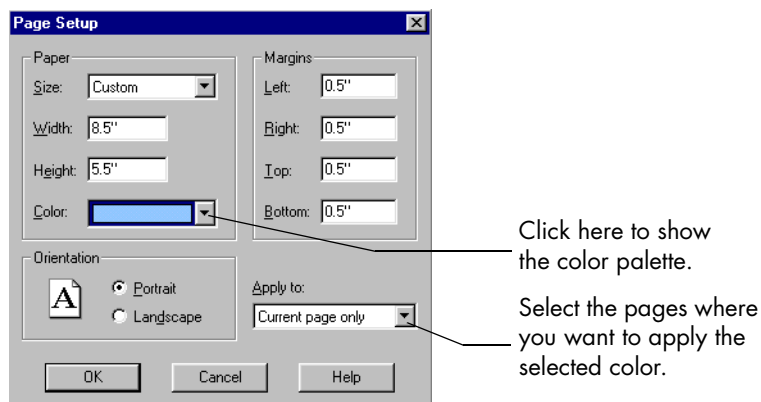
Adding Color to Forms

You can change the colors that appear on the background of your form and the colors of elements within your form.

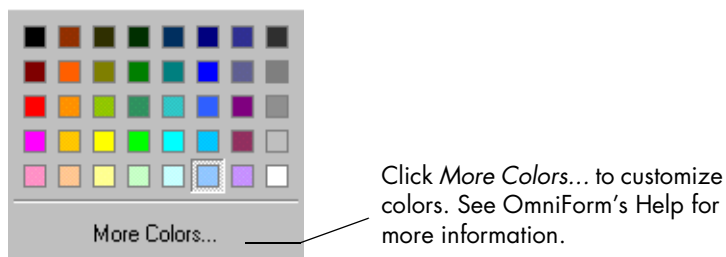
▼ To adjust the background color on your form:

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Page Setup...** from the File menu.

The Page Setup dialog box appears.



3. Select the color you want in the **Color** drop-down palette.



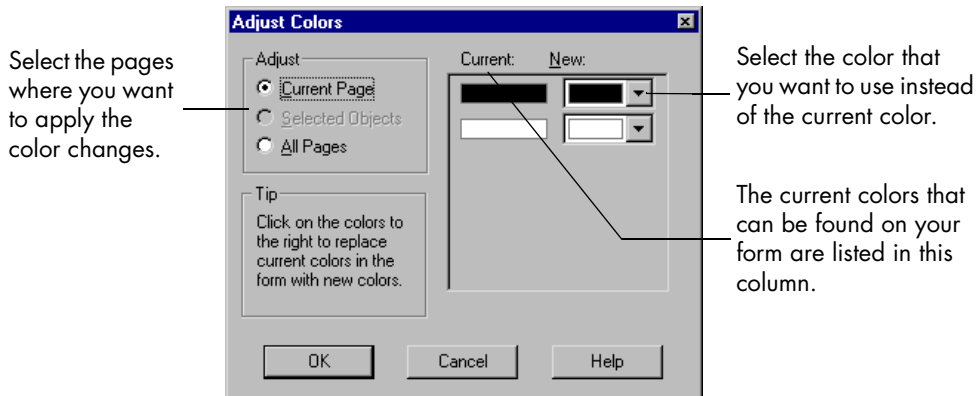
4. Select the pages where you want to apply the selected color in the **Apply to** drop-down list.

5. Click **OK** to apply your changes and close the dialog box.

▼ **To replace colors on your form with different colors:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Adjust Colors...** in the Format menu.

The Adjust Colors dialog box appears.



3. Select the pages or objects where you want to adjust colors.
4. Select the desired colors in the drop-down color palettes.

The selected colors will replace the current colors on your form.

5. Click **OK** to apply your changes and close the dialog box.

▼ **To modify the color of a particular form element:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select the element you want to modify.

Shift-click to select multiple elements so you can apply color settings to all of them at once.



- Click the Object Appearance button in the design toolbar or choose **Object Appearance...** in the Format menu.

The dialog box that appears varies depending on the selected element. Click the **Help** button in the dialog box for more information on available options.

- Click each of the tabs in the dialog box and make the desired color selections.
- Click **OK** to apply your changes and close the dialog box.

Adding Hyperlinks

You can easily set up hyperlinks on your forms. A hyperlink is a connection from a place on your form to another file or Web site. For example, you can add a hyperlink that takes the person filling the form to a different form or to your company's Web site.

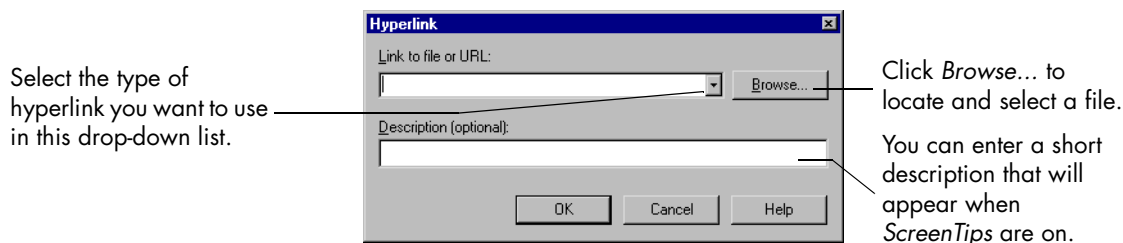
▼ To add hyperlinks to your form:

- Open a form in OmniForm and click the **Form Designer** tab.
- Select an element on your form where you want to add a hyperlink.

You can add hyperlinks to rectangles, ovals, graphics, and text.

- Choose **Hyperlink...** in the Format menu.

The Hyperlink dialog box appears.



- Enter the desired location of the hyperlink.

Click **Help** to get more information on each option.

5. Enter a description of your hyperlink in the **Description** text box if desired.
6. Click **OK** to apply your settings and close the dialog box.

To check the hyperlink, right-click over it and choose **Follow Hyperlink**.

Note ScreenTips must be turned on for the description (or link address) to appear over the hyperlink when you are in Form Filler or OmniForm Filler. Choose **Options...** in the Tools menu and select **ScreenTips** in the **General** tab.

Inserting Objects

You can easily insert objects from other sources into your forms. OmniForm supports objects created in a variety of applications. For example, you could insert a Microsoft Word Document as a launchable icon or display its full text directly in your form.

This section provides an overview of inserting objects. For complete information on modifying form elements, see OmniForm's Help.

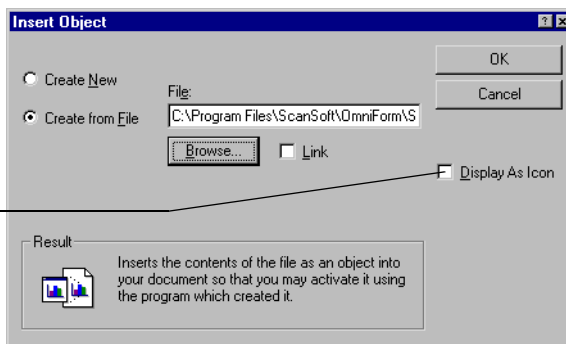
▼ To insert an object into a form:

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Insert New Object...** in the Edit menu.

3. Select whether you want to create a new object or create the object from an existing file. See OmniForm's Help for more information on each of these options.

The Insert Object dialog box changes depending on which option you select. This example shows how the dialog looks when you select **Create from File**.

Select *Display as Icon* to bring the object in as an icon rather than displaying its actual content.



4. If you are inserting an existing object, select the file you want to use. If you are inserting a new object, select the object type you want to create.
5. Click **OK**.

If you are inserting an existing object, the object appears on your form as specified.

If you are creating a new object, the application that you specified will appear so that you can create the object. After creating the object, it will appear on your form.

Setting Up User Profile Fields

A **User Profile** is a convenient feature that remembers and stores information about form users. As form users fill out forms for themselves, they can select their User Profiles to enter the remembered information automatically.

User Profiles can only be used on forms that have fields set up to receive User Profile information. As the form designer, you must set up these User Profile fields before distributing your form.

This section describes the easiest way to set up User Profile fields on a form. For information on creating a User Profile, adding data to it, and using it to fill out forms, see the *OmniForm Filler User's Guide*.

Tip

A **Client Profile** is another convenient feature for filling out forms automatically. Client Profiles are similar to User Profiles except they remember information about other people, such as customers, employees, and family members. Client Profiles are set up entirely in OmniForm's Form Filler view (or OmniForm Filler), so no design tools are required. For more information on setting up and using Client Profiles, see the *OmniForm Filler User's Guide*.

Usage Example for a User Profile

This example illustrates how a User Profile field would work to automatically insert a user's name from a User Profile.

In Form Designer:

- ① When the form is designed, its *name* field is linked to the *Full Name* User Profile Field.

In Form Filler:

- ② A user opens the form and sees that the *name* field is a User Profile field because it is highlighted in orange.

- ③ The user selects their User Profile to use with this form.

In Form Filler:

- ④ If their User Profile already has their name information filled in for the *Full Name* User Profile Field, then the name automatically inserts into this field.

OR

- ④ If they had not yet added their name to their User Profile, then they must enter their name on the form manually. After entering their name, it will automatically be added to the *Full Name* field in their User Profile (as soon as they switch records).

In the User Profile:

**Full Name
User Profile
field**

▼ To set up User Profile fields on a form:

1. Open a form in OmniForm and click the **Form Designer** tab.

For example, you might want to set up the *First Name* field as a User Profile field.

The screenshot shows the OmniForm application window with the title bar 'OmniForm - [Contacts.ofm]'. The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains icons for file operations, editing, and viewing. The 'Form Designer' tab is active, showing a form titled 'Contacts'. The form fields include: Title, First Name, Last Name, Position, Company, Address, City, State, Zip Code, Country, Birth Date, Phone Number, Fax Number, and a Notes section with multiple lines. At the bottom, there are two large yellow boxes labeled 'Photograph' and 'Business Card'. A line points from the text 'For example, you might want to set up the First Name field as a User Profile field.' to the 'First Name' field.

A User Profile needs to be selected while setting up User Profile fields in case you want to create or use custom fields. For more information on creating custom fields, see page 65.

2. Choose **Select User Profile** in the Profiles menu and select a User Profile.

If there are no User Profiles, choose **Add New...** and enter a name for the User Profile when you are prompted. Then close the Edit User Profiles dialog box.

3. Choose **Link Fields to User Profile...** in the Profiles menu.

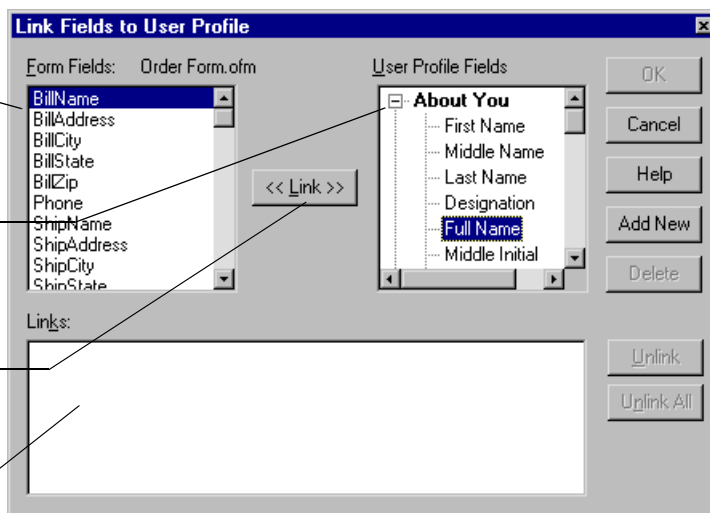
The Link Fields to User Profile dialog box appears. It contains a standardized list of User Profile fields that you can link to fields on your form.

The names of all the fields on your form appear in this list.

The standardized User Profile fields to which you can link appear in this list.

Click *Link* to link a selected form field with a selected User Profile field.

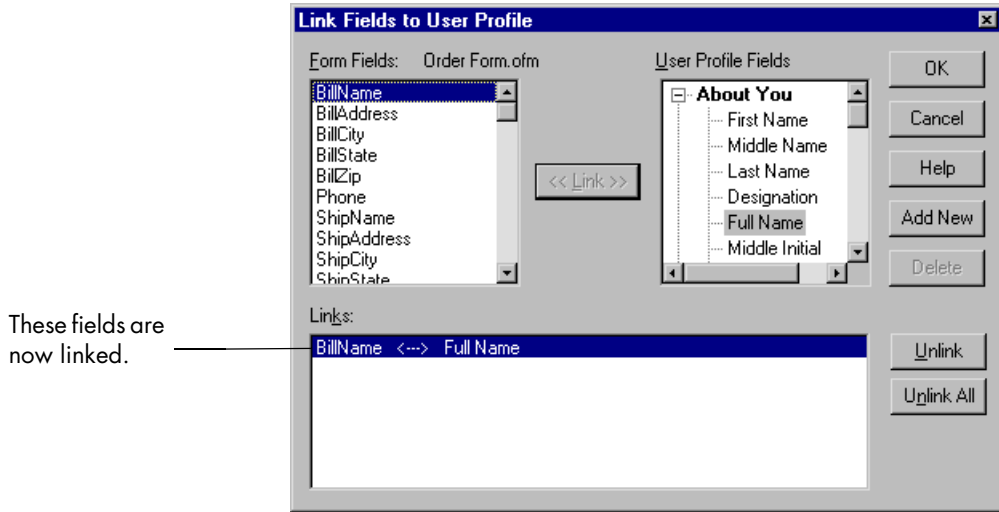
Currently linked fields appear in the *Links* list.



4. Select a form field that you want to link to a User Profile field.
5. Select the desired User Profile field.

6. Click **Link**.

The selected fields will appear in the **Links** list.



7. Repeat steps 4 through 6 until you are finished linking the desired fields.

8. Click **OK** when you are finished.

The form fields you linked are highlighted in orange to indicate they are ready to receive data from User Profiles. (If you do not see the orange highlight, choose **Highlight User Profile Fields** in the Profiles menu.)

Note You can also link an individual field on a form to a User Profile field by using the **Object Definition** command in the Format menu. For more information on setting up User Profile fields this way, see OmniForm's Help.

Creating Custom User Profile Fields

The default User Profile provides hundreds of standardized fields that you can link to fields on your form. Most people will find the fields they need in the default list. However, you can also create custom User Profile fields for specific company or industry information.

▼ **To create a custom User Profile field:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Select User Profile** in the Profiles menu and select a User Profile.

The custom User Profile fields you create will be added to the User Profile you select. If there are no User Profiles, choose **Add New...** and enter a name for the User Profile when you are prompted. Then close the Edit User Profiles dialog box.

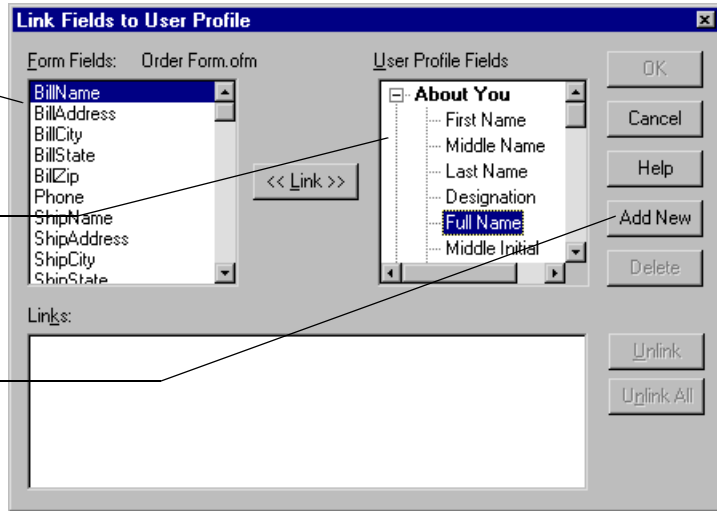
3. Choose **Link Fields to User Profile...** in the Profiles menu.

The Link Fields to User Profile dialog box appears. It has a standardized list of User Profile fields that you can link to fields on your form.

The names of all the fields on the current form appear in this list.

The standardized User Profile fields that you can link to appear in this list.

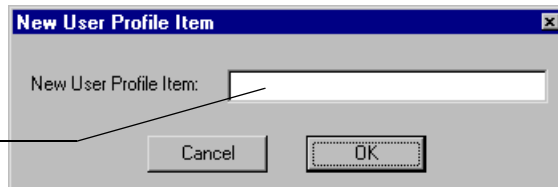
Click *Add New* to create a custom User Profile field.



4. Click **Add New**.

You are prompted to enter a name for your field.

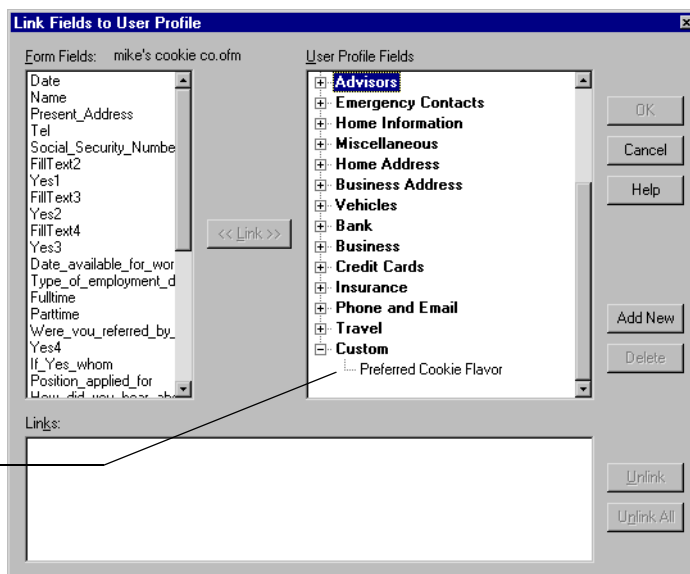
Enter a name for your custom User Profile field.



5. Enter a name for the custom User Profile field and click **OK**.

The new field will appear in the **User Profile Fields** list.

Your new User Profile field appears in the *Custom* section.



6. If you want to link a field on the current form to your custom User Profile field, select the desired field in the **Form Fields** list and select your custom field. Then click **Link**.
7. Click **OK** when you are finished.

Custom fields are added to the Custom Information page that is located on the last page of the current User Profile. When a user opens a form that is linked to a custom User Profile field, that field will be added to their User Profile's Custom Information page also.

Note You can also create custom User Profile fields by using the **Object Definition** command in the Format menu. For more information on creating custom fields this way, see OmniForm's Help.

Setting Up AutoFill Fields

AutoFill fields make it easier for a user to fill out a form. Use OmniForm's AutoFill Wizard to set up the following types of AutoFill fields:

- ◆ A field that has a drop-down list containing selectable choices (such as a list of products)
- ◆ A field that, after information is entered, automatically fills another field (such as a department name field that automatically fills in an associated department number)
- ◆ A combination of the first two items (a field with drop-down selections that automatically fills another field)
- ◆ A field that automatically replaces information that is entered with information that you specify (such changing *CA* to *California*)

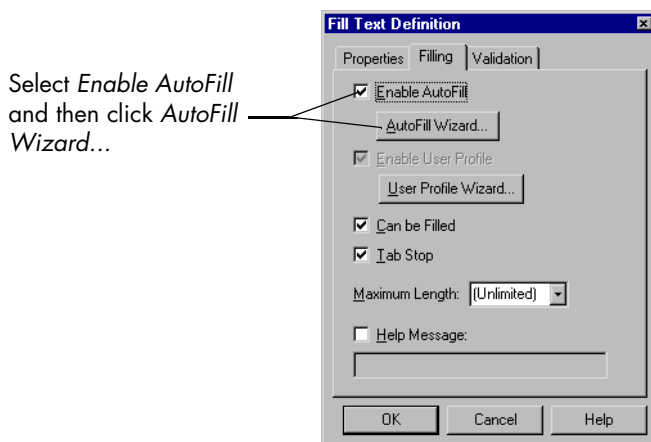
This section gives you an overview of how to create AutoFill fields. For more information on AutoFill fields, see OmniForm's Help.

Note You cannot create an AutoFill field in a field that is already set up as a User Profile field.

▼ To create an AutoFill drop-down list:

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select the fillable text field or comb field where you want to create a drop-down list.

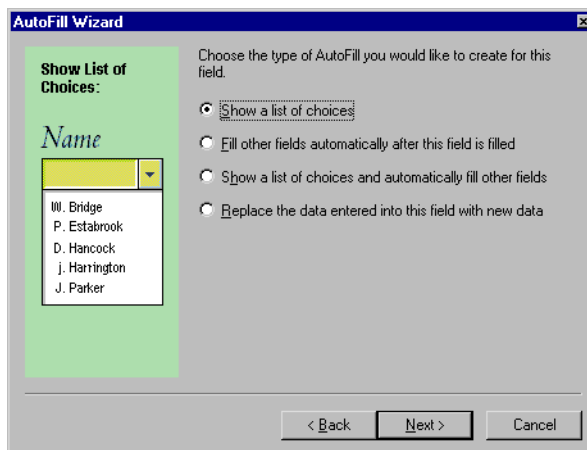
3. Choose **Object Definition...** in the Format menu and click the **Filling** tab in the dialog box that appears.



4. Select **Enable AutoFill** and click **AutoFill Wizard....**

The AutoFill Wizard appears.

5. Select **Create or edit the AutoFill of the current field** and click **Next**.
6. Select **Show a list of choices** and click **Next**.



You can get the list of choices from a variety of sources including lists you create manually, lists from ODBC sources, and lists from OmniForm forms or databases. This example shows you how to create a list manually. See OmniForm's Help for more information on using other sources.

7. Select **Manually entered list** and click **Next**.
8. Click **Add** and then type a desired text entry for the list.
9. Repeat step 8 to continue adding text entries and click **Next** when you are finished.
10. Click **Finish** to close the AutoFill Wizard.
11. Click **OK** to apply the settings to the current field.

▼ **To create an AutoFill field that automatically fills another field:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select a field that you want to make an AutoFill field for filling other fields.
3. Choose **Object Definition...** in the Format menu and click the **Filling** tab in the dialog box that appears.
4. Select **Enable AutoFill** and click **AutoFill Wizard...** to open the AutoFill Wizard.
5. Select **Create or edit the AutoFill of the current field** and click **Next**.
6. Select **Fill other fields automatically after the field is filled** and click **Next**.

You can automatically fill fields on your form from a variety of sources including lists you create manually, lists from ODBC sources, and lists from OmniForm forms or databases. This example shows you how to create a list manually. See OmniForm's Help for more information on using other sources.

7. Select **Manually entered list** and click **Next**.

The *Available fields* list displays all the fields on your form. Select a field that you want to be filled automatically and click the right-arrow button.

The fields you select appear in the *Fields to fill* list. These are the fields on the form that you want to fill automatically.

To remove a selected field from the *Fields to fill* list, select the field and click the left-arrow button.

8. Specify the form fields that you want to be filled automatically by selecting a field and clicking the right-arrow button.
9. Click **Next** when you are finished selecting the desired fields.
10. Enter text for your AutoFill fields in the dialog box that appears.

The first column is the field that begins the automatic filling process.

The next column contains the field that will be filled automatically after the first field has been filled.

11. Click **Add** and then type a text entry in the first column.

This is the text that a user enters that will invoke specific entries in other fields. For example, you could type in the name of a department at work.

12. Click under the next column and then type the text that you want to be automatically filled in that field.

For example, you could type in the department number that corresponds to the department name in column one.

13. Repeat steps 11 and 12 to continue adding text entries and click **Next** when you are finished.

14. Click **Finish** to close the AutoFill Wizard.

15. Click **OK** to apply the settings to the current field.

Tip

Creating AutoFill fields that automatically replace entered data is useful if you want to standardize the way data is entered on a form. For example, if your form contains a *State* field, you might want the full spelling of the state to be entered. To achieve this, you can make this an AutoFill field that converts abbreviations of the state name to the full spelling.

▼ **To create an AutoFill field that automatically replaces entered data:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select a field where you want to create an automatic data replacement.
3. Choose **Object Definition...** in the Format menu and click the **Filling** tab in the dialog box that appears.
4. Select **Enable AutoFill** and click **AutoFill Wizard...** to open the AutoFill Wizard.
5. Select **Create or edit the AutoFill of the current field** and click **Next**.

6. Select **Replace the data entered into this field with new data** and click **Next**.

7. Click **Add** and then type a text entry that you want to be replaced in the **Replace** column.
For example, type in *CA*.
8. Click under the **With** column and then type the desired replacement text.
For example, type in *California*.
9. Repeat steps 7 and 8 to continue adding text entries and click **Next** when you are finished.
10. Click **Finish** to close the AutoFill Wizard.
11. Click **OK** to apply the settings to the current field.

Using Calculations in Fields

You can use **calculations** in fill text, comb, check box, table, and circle text fields. Calculations automate data entry and prevent errors. For example, you can create a calculation that will automatically insert the sum for a column of numbers so the person filling the form does not have to compute the numbers manually. All you have to do is define the calculation properly and OmniForm does the rest of the work.

This section provides a brief overview of how to create calculations. See OmniForm's Help for more information on calculations including the use of specific operators and functions.

▼ To create a calculation for a field:

1. Open a form in OmniForm and click the **Form Designer** tab.



2. Click the Calculation button in the design toolbar or choose **Calculation** in the Tools menu.

The calculation toolbar appears.

Click *Accept Calculation* to accept the calculation in the text box.

Click *Calculation List* to open the Calculation List dialog box and view all your calculations.

Click *Auto Calculation* to have OmniForm try to define a calculation automatically.



Click *Cancel Calculation* to revert to the last accepted calculation.

Click *Calculation Builder* to open the Calculation Builder dialog box and create your own calculation.

The Calculation text box shows the calculation for the currently selected field. Click in the text box to edit a calculation manually.

3. Select the field for which you want to create a calculation.

Once an appropriate field is selected, buttons on the calculation toolbar become available.

4. Enter a calculation in the Calculation text box.

There are three ways to do this:

- ◆ Click the **Calculation Builder** button to define a calculation using the Calculation Builder dialog box.
- ◆ Click the **Auto Calculation** button to have OmniForm define a calculation automatically.
- ◆ Click in the calculation text box and type in a calculation manually.

See OmniForm's Help for more detailed information on each of these options.

5. Click the **Accept Calculation** button to accept the calculation once you are satisfied with it.

Closing the calculation toolbar also accepts the current calculation. You can check the calculation by viewing the form in Form Filler.

Note If a field is set up as a User Profile field and also has a calculation, the calculation will override the User Profile information.

▼ **To change a calculation:**



1. Click the Calculation List button in the calculation toolbar.

The Calculation List dialog box appears.

2. Double-click the **Field Name** that you want to change.

The calculation that you want to change appears in the Calculation text box.

3. Make the desired changes to the calculation.



4. Click the **Accept Calculation** button to apply the change.

When you open the form in Form Filler, you will be asked if you want to recalculate records based on the change. You can also do this by choosing **Recalculate...** in the Records menu.

Setting Up Field Validation

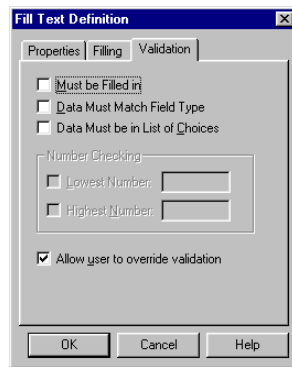
You can set up **field validation** for fillable fields so that they:

- ◆ Require that *some* information be filled in so that the field is not left blank.
- ◆ Require that *specific* information be entered.
- ◆ Require that information be entered from a list of choices.

▼ To set validation options for a fillable field:

1. Select the fillable field and choose **Object Definition...** in the Format menu.

The Definition dialog box for that particular form element appears.



2. Click the **Validation** tab.
3. Select the desired options for validation. See OmniForm's Help for more information on each option.
4. Select **Allow user to override validation** if you want to allow users to override the warning that appears when they enter either no or inappropriate information in a field.
5. Click **OK** when you are finished selecting validation options.

Adding Security to Forms with Digital Signatures

You can use **digital signature fields** to add security to a form. Digital signature fields authenticate and protect data on a form by locking specific fields and detecting if a form has been altered outside of OmniForm. After a field is locked, only a user with the correct password can unlock the field to change its data.

For example, you might use a digital signature field on an expense report form that requires an employee's signature. The employee's signature would lock other fields on the form. Once the employee "signs" the form, no one can change the locked fields unless they have the correct password.

OmniForm supports three types of digital signature fields:

- ◆ **OmniForm Signature**

This allows you to protect data with passwords that you set up in an OmniForm user database. The user database stores the names and passwords of people who will be using the form. See page 79 for more information on setting up an OmniForm user database.

- ◆ **Entrust Signature**

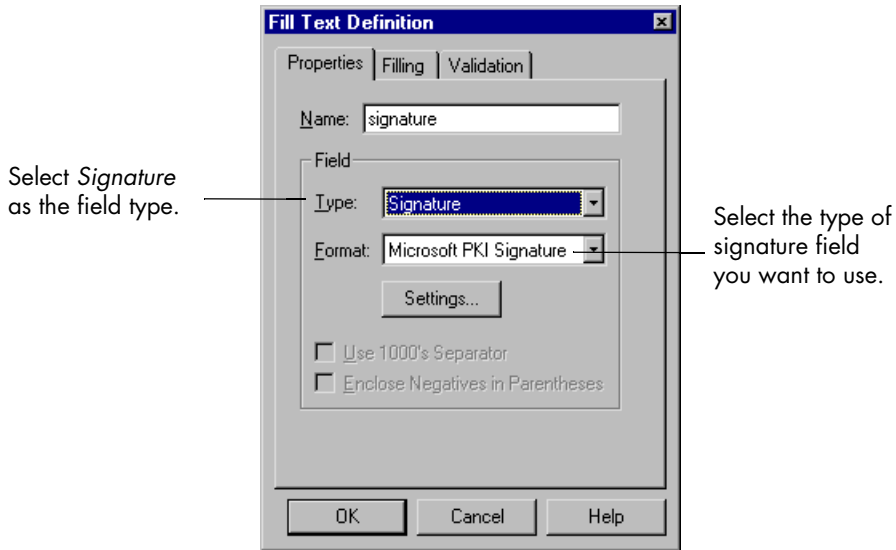
This is a more secure level of protection than an OmniForm Signature. It requires additional authentication software from Entrust. Please see the documentation supplied by Entrust software for more information on setting up and using this kind of digital signature.

- ◆ **Microsoft PKI Signature**

This is a more secure level of protection than an OmniForm Signature. Microsoft PKI (also known as Microsoft Crypto API) is an implementation of the RSA Public-Key Cryptography Standards (PKCS). It supports X.509 digital certificates issued by a third party PKI vendor such as Verisign Inc. You can also create your own certification authorities within your enterprise. If you are already using secure messaging with Microsoft Outlook, you can use the same certificates (digital IDs) to sign your OmniForm forms. Please see the documentation supplied by Microsoft for more information on obtaining and managing your PKI certificates.

▼ **To create a digital signature field:**

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Select a fillable text field that you want to make a digital signature field.
3. Choose **Object Definition...** in the Format menu.

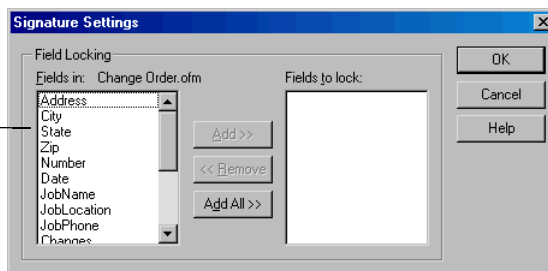


4. Click the **Properties** tab.
5. Select **Signature** as the field type.
6. Select the type of signature field you want to use in the **Format** list.
 - ◆ The **OmniForm Signature** format requires that you set up an OmniForm user database. See page 79 for more information.
 - ◆ **Entrust Signature** and **Microsoft PKI Signature** formats require that you have the corresponding software or certificates installed. Please see the documentation for those applications for more information.

7. Click **Settings...** if you want to specify fields to lock with this signature.

The Signature Settings dialog box appears.

Select the fields that you want to lock with the signature field and click *Add* to add the fields.



8. Select the fields that you want to lock with the signature field and click **Add**.
9. Click **OK** when you are finished.

Setting up an OmniForm User Database for OmniForm Signatures

To use an OmniForm Signature field on a form, you must set up a user database that stores the names and passwords of the people who will be using the form. This section describes how to create an OmniForm user database.

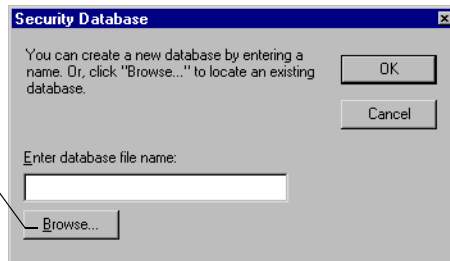
Note This operation should be performed by your work group administrator. A user database contains information about the members of your work group, such as user names, passwords, and descriptive full names. It is the basis for form signing and signature verification in the work group. The database should be located where all work group members can access it, such as a network drive.

▼ **To create a user database for a form:**

1. Open the form in OmniForm and click the **Form Designer** tab.
2. Choose **Security...** in the Tools menu.

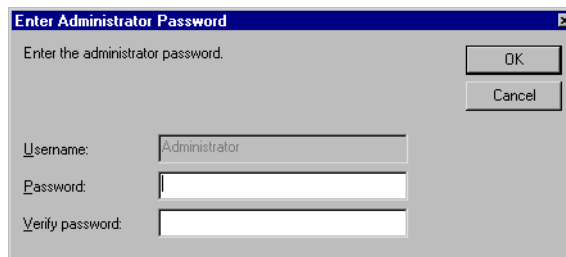
The Security Database dialog box appears.

If you already have a user database that you want to use with the form, click *Browse...* to locate it.



3. Enter a file name for the database and click **OK**.
4. Click **Yes** when asked to confirm.

The Enter Administrator Password dialog box appears.



5. Enter a password and then enter it again to verify it.

Note Be sure to write down your password somewhere safe. If you lose or forget your password it cannot be recovered. Do not use the following characters in your password: "/\ [] ; : | = , + * ? < >

6. Click **OK**.

The Security Database Administration dialog box appears. You can now add users to your new database. See the next section for instructions.



7. Click **OK** to close the Security Database Administration dialog box.

The current form is now associated with the new user database. See OmniForm's Help for information on changing the user database that is associated with a form.

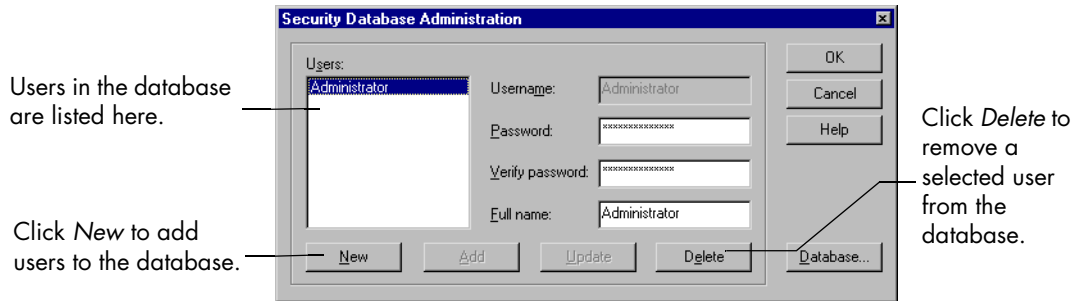
▼ **To add users to a user database:**

1. Open the form in OmniForm and click the **Form Designer** tab.
2. Choose **Security...** in the Tools menu.

The Enter Administrator Password dialog box appears.

3. Enter your password in this dialog box and click **OK**.

The Security Database Administration dialog box appears. All the current users are displayed in the **Users** list box.



4. Click the **New** button to add a new user.
5. Enter the following information for the new user:

- ◆ User's name (up to 20 characters) in the **Username** text box
- ◆ User's password (up to 14 characters) in the **Password** text box

Do not begin a username or password with a period or a space. Also, do not use the following characters in a username or password:

" \ [] : ; | = , + * ? < >

- ◆ User's password again in the **Verify password** text box
- ◆ User's full name (up to 50 characters) in the **Full name** text box

Do not begin a full name with a period or a space. Also, do not use the following characters in a full name:

" \ [] : ; | = + * ? < >

Note Be sure to write down passwords. If a password is forgotten, it cannot be recovered. In this case, you will have to delete the user from the database and add the user back again with a new password.

6. Click **Add** to add the new user.
7. Click **OK** to close the dialog box.

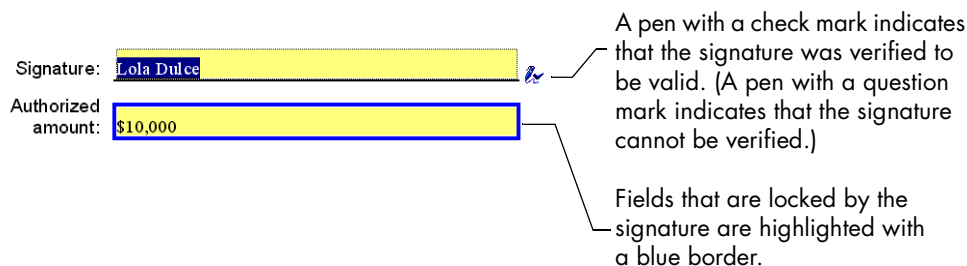
See OmniForm's Help for information on modifying a user's settings.

Note Signature fields that have been signed will be invalidated if you change the password of the person who signed the fields. Before changing their password, be sure that users unsign the signature fields in all their form records.

Signing and Verifying Digital Signatures

To sign a digital signature field, users just click the field and then enter their password. (OmniForm Signatures also require access to the OmniForm user database at the time they are signed.) After a digital signature field is signed, the authentication process verifies the signature to ensure that it is valid.

When viewing forms in OmniForm Filler or OmniForm's Form Filler view, turn on **Field Security** in the View menu to display an icon next to signed fields. The icon shows whether a signed field has been verified or not.



To unsign a field, users must click the field and enter their password again.

For more information about signing and verifying signature fields, see the *OmniForm Filler User's Guide*.

Note After a user signs a form record, that form's design becomes locked. If you need to change the form design, anyone who has signed records in the form's database must unsign the records first. Or, you can save the form with a different name and delete all records from its database.

Protecting Form Design and Data

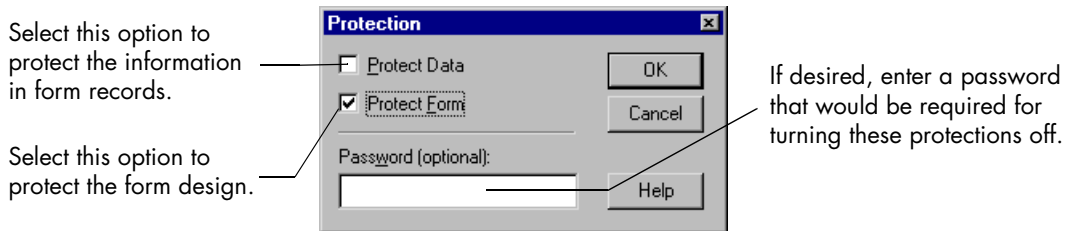
Any change made to a form's design affects all records in its database. For example, if you delete a fillable text field, all the information entered for that field in all form records will be deleted.

You might want to protect a form from being altered, especially if it is going to be shared by multiple people. To protect a form, you can turn on settings that prevent changes to its design and data.

▼ To protect your form's design or data from being altered:

1. Open a form in OmniForm and click the **Form Designer** tab.
2. Choose **Protection...** in the Tools menu.

The Protection dialog box appears.



3. Select **Protect Form** to protect the form's design.
4. Select **Protect Data** to protect information in the records associated with the form.
5. Enter a password, if desired, that would be required for someone to open the Protection dialog box and turn off form protection.

Note Passwords are case sensitive. If you lose or forget your password, it cannot be recovered.

6. Click **OK**.

If you turned on form protection, OmniForm's design tools are now unavailable for that form. If you turned on data protection, you cannot edit

records or create new ones. A message appears informing you of the protection status if you attempt to modify the form or its data.

Chapter 5



Distributing Forms

OmniForm offers a variety of options for distributing your forms for people to fill out. This chapter describes these options in the following topics:

- ◆ Making Forms Available in Different File Formats
- ◆ Emailing OmniForm Forms, Data, and Mailable Fillers
- ◆ Printing Forms
- ◆ Publishing Forms to the Web

Making Forms Available in Different File Formats

OmniForm Form (OFM) is the default format that is used when you save a form in OmniForm. An OmniForm Form is automatically set up with a searchable database. As new records are filled out for the form, each record is stored in the database.

For more information on filling forms and managing records in form databases, please see the *OmniForm Filler User's Guide*.

Tip You can set up an OmniForm database so that multiple users can share it. This allows anyone with OmniForm or OmniForm Filler to fill out new form records and look through existing form records. See the *OmniForm Filler User's Guide* for more information.

If you have **OmniForm Premium**, you can also save and distribute forms in the following file formats. For information on upgrading to OmniForm Premium, please go to **www.scansoft.com** and click the **products** link.

- ◆ OmniForm Markup Language (OFML)
- ◆ Hypertext Markup Language (HTML)
- ◆ Adobe Portable Document Format (PDF)
- ◆ Microsoft Word Rich Text Format (RTF)

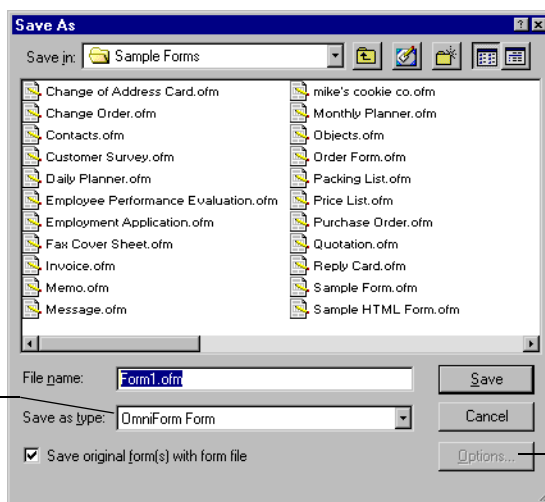
Tip Before saving a form to HTML format, it is recommended that you preview the form by choosing **Preview in Browser...** in the File menu. See page 99 for more information.

▼ To save a form as a specific file type:

1. Choose **Save As...** in the File menu.

The Save As dialog box appears.

By default, OmniForm saves your form as an *OmniForm Form* file type.



If you are saving your form as an RTF, HTML, or PDF file, click *Options...* to make additional selections for that file type.

2. Enter a file name and select a folder location for your form.
3. Select the desired file type in the **Save as type** drop-down list.

OmniForm Form (OFM) is the default file type.

4. If you selected **Microsoft Word (RTF)**, **HTML**, or **PDF**, click **Options...** to select conversion options for that file type.

The conversion options for each of these file types will vary. See OmniForm's online Help for more information on these options.

5. Click **Save**.

▼ To save an **OmniForm Form** as you are working on it:



1. Click the **Save** button or choose **Save** in the File menu.

If this is the first time you are saving the form, the Save As dialog box appears. See the previous section for more information.

2. Continue clicking **Save** whenever you want to save the latest changes to your form's design.

If you are filling out data on a form, you do not need to click **Save**. New records and entered data are saved automatically.

Saving Mailable Filler Forms

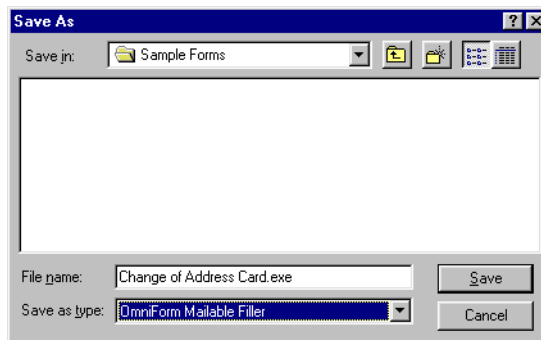
The Mailable Filler format allows you to send forms to people who do not have OmniForm.

Note OmniForm includes a trial license for a specified number of Mailable Fillers. The details of this license are described in an insert in your package. After you have used all your licensed number of uses, please contact ScanSoft (www.scansoft.com) to purchase additional licenses.

▼ To save a form in Mailable Filler format:

1. Choose **Save As Mailable Filler...** in the File menu.

The Save As dialog box appears.



2. Enter a file name and select a folder location for your Mailable Filler file.
3. Click **Save**.

OmniForm saves the Mailable Filler form as both an HTML file and a self-running executable file (EXE). You can send either of these files to anyone to fill out, and have the files returned to you in the same manner.

Emailing OmniForm Forms, Data, and Mailable Fillers

You can send your OmniForm Forms and form data as email attachments if you use Lotus cc:Mail, Lotus Notes, Microsoft Exchange, or Microsoft Outlook. OmniForm selects your installed email application by default if you have only one installed. If you have more than one of these email applications, select which one you want OmniForm to use by default.

▼ To select a default email application:

1. Choose **Options...** in the Tools menu.

The Options dialog box appears.



2. Click the **General** tab and select an option under **Mail System**.
3. Click **OK**.

Specifying What You Want to Email

When you email a form in OmniForm, you have the choice of sending it in the following ways:

- ◆ Blank OmniForm Form
- ◆ OmniForm Form and data
- ◆ Data only
- ◆ Mailable Filler

The first three choices require that the recipient have OmniForm or OmniForm Filler installed to open it. The **Mailable Filler** format allows you to send forms to people who do not have OmniForm.

Note OmniForm includes a trial license for a specified number of Mailable Fillers. The details of this license are described in an insert in your package. After you have used all your licensed number of uses, please contact ScanSoft (www.scansoft.com) to purchase additional licenses.

▼ **To send a form as an email attachment:**

1. Open the form that you want to send.

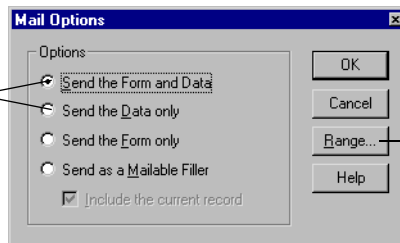
If you want to send data that is associated with the form, open it in Form Filler by clicking the **Form Filler** tab.

2. Choose **Send...** in the File menu.

3. Log into your email application if you are prompted to do so.

The Mail Options dialog box appears. The options available depend on whether you are sending the form from Form Designer or Form Filler. These are the Form Filler options:

Form Filler has these two extra options for sending form data. Form Designer only allows you to send the blank form or a Mailable Filler.



Click **Range...** to specify a range of records if you are sending form data.

4. Select an option for sending your form.

Click **Help** for more information about the available options.

5. If you are sending form data, click **Range...** to specify the range of records you want to send.

If you do not specify a range, OmniForm will send all records.

6. Click **OK** in the Mail Options dialog box.

A new message from your email application appears with your OmniForm file attached and ready for addressing.

Note If you send a Mailable Filler, it attaches both an HTML file and a self-running executable file (EXE) to your message. You are not required to send both file formats. If you know which format is supported by the recipient's email, you can delete the other attachment. (The HTML version is recommended for email systems that do not allow executable file attachments.)

7. Address your email message and send it as you would any other message.

Adding a Routing Slip

If you are a Microsoft Exchange or Outlook user, you can add a routing slip to email. Please see your Microsoft documentation for more information on routing slips.

To add a routing slip:

1. Open the form that you want to send.

You can send a form from Form Designer or Form Filler.

2. Choose **Add Routing Slip...** in the File menu.

The Add Routing Slip dialog box appears.

3. Select the recipients and other routing information.

You can send the document either now or later.

4. Click **Route** to route the document. Or, click **Add Slip** to close the dialog box without routing the form.

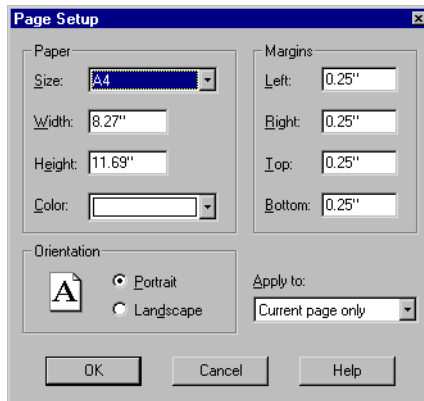
Printing Forms

You can print forms with different page sizes, margins, orientation, and color.

▼ To change page settings before printing a form:

1. Open the form in Form Designer.
2. Choose **Page Setup...** in the File menu.

The Page Setup dialog box appears.



3. Select the desired options.
4. Click **OK** to apply your options and close the dialog box.

To save these changes to your form, click **Save** before closing the form.

▼ **To print your form:**

1. Open the form in Form Filler if you want to print data in the form.



2. Click the **Print** button or choose **Print...** in the File menu.

The Print dialog box appears.

These options appear only if you are printing from Form Filler.

If you are printing *Form and Data* or *Data Only*, select the records you want to print.

3. Select the desired options for printing.

Tip

If you are printing from Form Filler, you can print **Form and Data**, **Data Only**, or **Form Only**. Selecting **Data Only** just prints the information you have entered in the fillable fields. This is useful if you want to print data on a preprinted form.

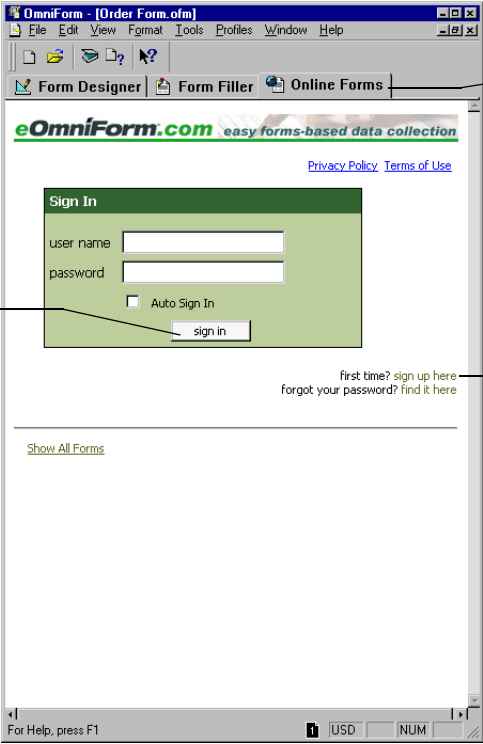
4. Click **OK** to start printing.

OmniForm prints your form with the selected settings.

Publishing Forms to the Web

OmniForm's **Online Forms** view allows you to instantly publish your forms on the Web using **eOmniForm.com**, which is ScanSoft's online forms hosting service. This is a very easy way to publish your forms on a secure (SSL-based) Web site. It does not require any complicated setup or technical knowledge — all you need is a connection to the Internet. After publishing your forms this way, anyone with a Web browser and Internet connection can fill them out.

To enter **Online Forms** view, click the **Online Forms** tab. This connects to a Web page that allows you to manage your forms online.



The screenshot shows the OmniForm application window with the 'Online Forms' tab selected. The web page displayed is the eOmniForm.com sign-in page. The page has a green header with the eOmniForm.com logo and the tagline 'easy forms-based data collection'. Below the header is a 'Sign In' section with fields for 'user name' and 'password', an 'Auto Sign In' checkbox, and a 'sign in' button. There are also links for 'Privacy Policy' and 'Terms of Use'. At the bottom of the sign-in section, there are links for 'first time? sign up here' and 'forgot your password? find it here'. A 'Show All Forms' link is visible below the sign-in section. The application window has a menu bar with 'File', 'Edit', 'View', 'Format', 'Tools', 'Profiles', 'Window', and 'Help'. The status bar at the bottom shows 'For Help, press F1' and currency/number settings.

Click **Online Forms** to display the Online Forms view.

You must sign in to access the Web site for your online forms.

If you are a first-time user, click here to create an account for yourself and pick a user name and password.

For more information on working in the **Online Forms** view and other Web Publishing options, see Chapter 6.

Chapter 6



Publishing Forms on the Web

This chapter describes how to publish OmniForm forms on the Web so anyone with Internet access and a Web browser can fill them out.

It includes the following topics:

- ◆ Tips for Publishing Forms on the Web
- ◆ Previewing Forms in Different Web Browsers
- ◆ Publishing Forms on the Web with eOmniForm.com
- ◆ Managing Forms on eOmniForm.com
- ◆ Accessing eOmniForm.com from a Web Browser
- ◆ Publishing Forms on Your Own Web Site

Tips for Publishing Forms on the Web

Most of the elements that you include in your OmniForm Forms will convert without a problem to the Web (HTML) format. However, there are a few guidelines that you should follow for Web publishing. Please keep the following tips in mind:

- ◆ Preview your form in the major Web browsers before publishing it to the Web. See page 99 for more information.

Users can use any Web browser that supports HTML version 3.2 and above to fill out your forms. Forms will typically look best in Microsoft Internet Explorer, version 5.0 and later. The next best results would be in Netscape, version 6 and later.

- ◆ Keep your form design as simple and concise as possible. The Web format does not have multiple pages, it presents the form as one long, scrolling page.
- ◆ You can publish forms containing up to 10 pages and 255 fields.
- ◆ Do not begin field names with the pound character (*#name*) or with numbers (*1name*).
- ◆ Allow enough room between form elements. Do not overlap any fields or other elements on a form. For example, do not put a text label inside a fill field. Overlapping elements will not look good when converted to the Web format.
- ◆ Make sure there is enough space in front of any circle text fields on your form. Circle text fields are converted to radio buttons (if items are grouped) or check boxes, so you want to make sure there is enough space to fit a radio button or check box.
- ◆ Do not rely on automatically filled fields. Drop-down fields are supported in the Web format, but fields that were originally designed to fill other fields will not work.
- ◆ Do not use spaces when naming forms that you plan to publish on the Web. For example, use *orderform* rather than *order form*. This is because Web browsers insert *%20* to indicate a space, so the form name on the Web browser would appear as *order%20form*.
- ◆ Form names must be 120 characters or fewer.
- ◆ Your eOmniForm.com user name will be part of your form's Web address. For example, if your user name is **fred**, a form named **orders** might be assigned a Web address like this: **www.eomniform.com/servlet/fillform/fred/orders**
- ◆ Web addresses are case sensitive.

Previewing Forms in Different Web Browsers

You should preview your form in all the major Web browsers before saving it to an HTML format or publishing it on the Web. That way, you can make adjustments to the form design if necessary.

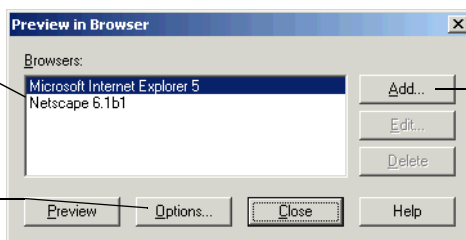
▼ **To preview a form in a Web browser:**

1. Open the form in OmniForm's **Form Designer** or **Online Forms** view.
2. Choose **Preview in Browser...** in the File menu.

The Preview in Browser dialog box appears and shows a list of Web browsers you have installed.

The Web browsers that you have installed appear in this list. Select the one you want to test.

Click *Options...* to select HTML conversion options.



Click *Add...* if you have other Web browsers installed on your computer but they do not appear in the list.

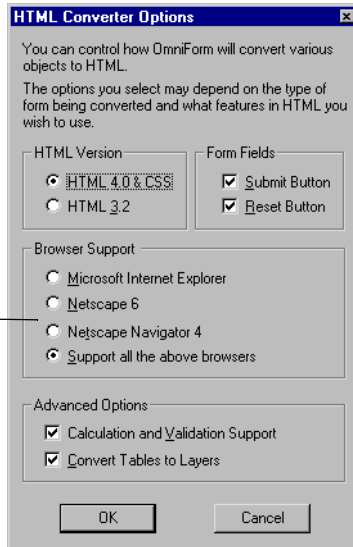
3. Select the name of the Web browser in which you want to preview your form.

4. Click **Options...** to select HTML conversion options.

The options that you select in the HTML Converter Options dialog box will be applied when previewing your form and when you save your form in HTML format.

If you know specifically which Web browser will be used to view your form, select that browser. Select *Support all the above browsers* if you are unsure which browsers will be used.

Make sure this selection matches the Web browser that you are going to use to preview your form.



Note When you publish a form with eOmniForm.com, it automatically optimizes your form according to the user's Web browser.

5. Select the desired HTML conversion options and click **OK**.
6. Click **Preview** in the Preview in Browser dialog box.

The selected Web browser opens and displays your form. Look at the form carefully and then make any necessary design adjustments back in OmniForm's Form Designer.

Publishing Forms on the Web with eOmniForm.com

OmniForm's **Online Forms** view allows you to instantly publish your OmniForm Forms on the Web using **eOmniForm.com**, ScanSoft's online forms hosting service. This is a very easy way to publish your forms on a secure (SSL-based) Web site. It does not require any complicated setup or technical knowledge — all you need is a connection to the Internet. After publishing your forms with eOmniForm.com, anyone with a Web browser and Internet connection can fill them out.

▼ **The process for publishing forms on eOmniForm.com is very simple:**

1. Open a form in OmniForm, and sign into eOmniForm.com using the Online Forms view.
2. Publish your form on the Web with just one click. eOmniForm.com provides you with the Web address where your form is published.
3. Send this Web address to the people you want to fill out your form.
4. Collect the form data from the Web using the Online Forms view. The data is added as new records in your OmniForm database.

ScanSoft offers you some limited, free publishing and storage on eOmniForm.com. For details on the terms of service and upgrade offers, please go to **www.eomniform.com** and click **Service Details**.

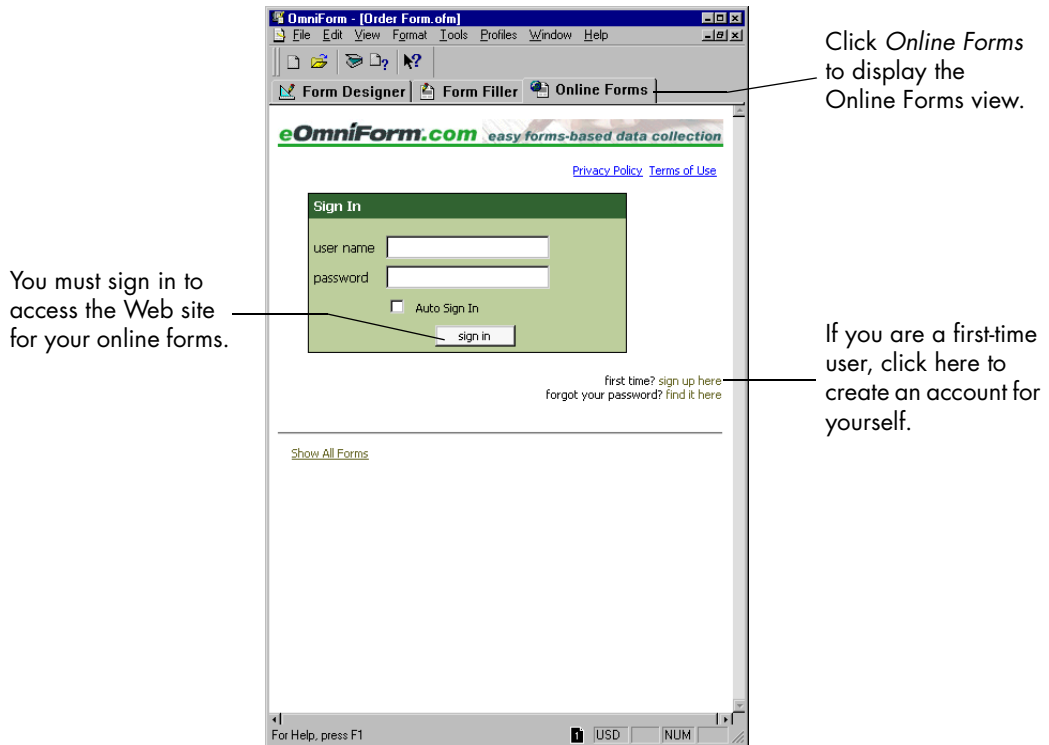
Note Typical of any Web site, eOmniForm.com continues to be updated on a regular basis. Therefore, the pictures in this *User's Guide* might not always exactly match the latest look of the OmniForm.com Web pages.

▼ To open the Online Forms view and sign into eOmniForm.com:

1. Open a form in OmniForm.
2. Make sure you are currently connected to the Internet.
3. Click the **Online Forms** tab.

OmniForm connects to the eOmniForm.com Web site.

If you have not created an eOmniForm.com account for yourself yet, see page 103 for instructions.



4. Enter your user name and password and click **sign in**.

Once you have signed in, you can start publishing your forms to the Web. See page 104 for more information.

▼ **To create an account for yourself on eOmniForm.com:**

1. Open a form in OmniForm.
2. Click the **Online Forms** tab.
3. Click the **sign up here** link.

Your Web browser opens a Web page that prompts you for some information.

4. Fill in the appropriate information and click **create**.

Tip

When you create an account for yourself on eOmniForm.com, you select your own user name. That user name will be part of each published form's Web address. For example, if your user name is **fred**, a form named **orders** might be assigned a Web address like this:

`www.eomniform.com/servlet/fillform/fred/orders`

After creating your account, you can go back to OmniForm's Online Forms view and enter your user name and password to sign in.

▼ **To publish a form on eOmniForm.com:**

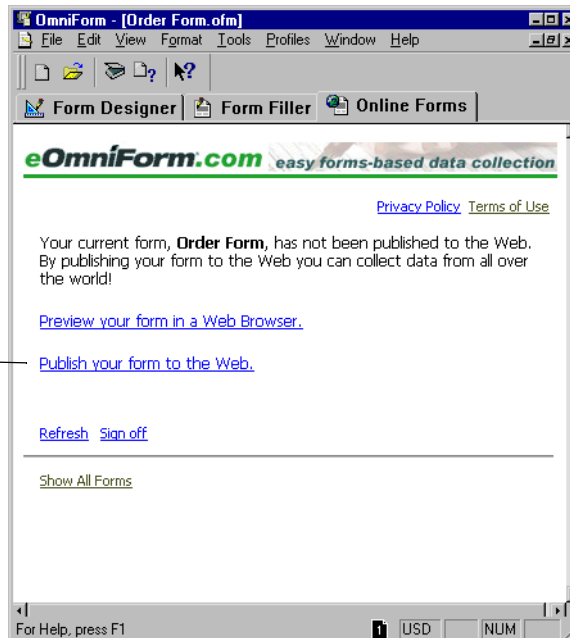
1. Open the form that you want to publish in OmniForm.

You can only publish OmniForm Forms (OFM).

2. Click the **Online Forms** tab and sign in.

Once you have signed in, you can publish your form.

Click here to publish
your form.



3. Click **Publish your form to the Web**.

The screen will change to show that your form was successfully published and you will receive notification by email as well. The screen and the email will

contain the Web address where your form was published. Give this Web address to people so they can fill out your form using their Web browsers.

Click here to copy the Web address to the clipboard.

The Web address where your form was published appears here. Copy and send this address to the people you want to fill out the form.



Note The number of forms you can publish on eOmniForm.com and the time period they can remain on the Web site depends on your service level. For more information, go to **www.eOmniForm.com** and click **Service Details**.

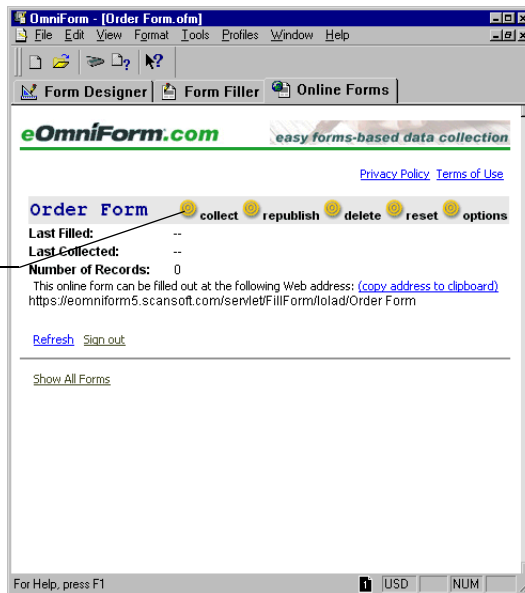
Managing Forms on eOmniForm.com

Use OmniForm's **Online Forms** view to collect data for and manage forms you have published on eOmniForm.com.

▼ **To collect data for a form on eOmniForm.com:**

1. Open the form for which you want to collect data.
2. Click the **Online Forms** tab and sign in.

Click here to collect
data for your form.



3. Click **collect** to collect all current data for your form.

OmniForm connects to the Web site and collects the data for each person who has filled your form. Data for each person is automatically downloaded as a new record into the database for your form. New records are added after any existing records. After the data is collected, your form is displayed in Form Filler so you can view the new records.

Tip

Each time you collect data for a form, previously collected data is skipped. If for any reason you need to recover (re-collect) previously collected data, see page 109 for instructions. To reset (delete) the data that is stored for a form on the Web site, see page 108.

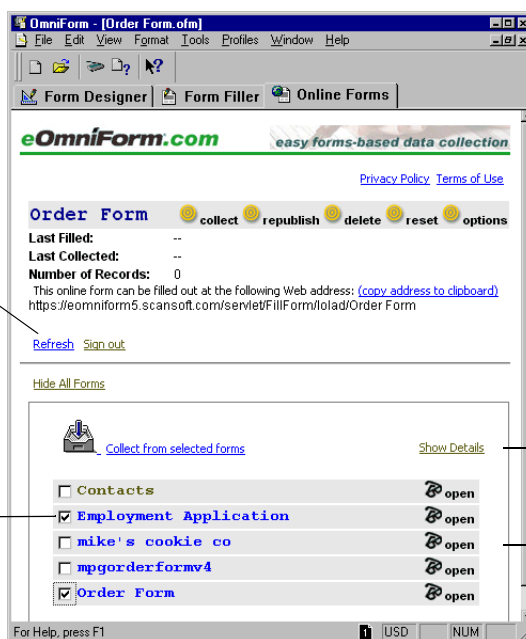
▼ **To show all published forms and collect data for them at the same time:**

1. Open a form in OmniForm.
2. Click the **Online Forms** tab and sign in.
3. Click **Show All Forms**.

All the forms that you have published with eOmniForm.com are displayed.

Click here to show or hide all forms that you have published with eOmniForm.com.

All forms that are published are displayed in this list. Select the check box next to the ones for which you want to collect data, and then click *Collect from selected forms*.



Click *Show Details* to display more information about each form.

Click *open* to open a particular form in Form Designer.

4. Select the check box next to each form for which you want to collect data.
5. Click **Collect from selected forms**.

▼ **To republish an updated form on eOmniForm.com:**

1. Open the form you want to republish.
2. Click the **Online Forms** tab and sign in.
3. Click **collect** to collect any data, if desired, for the form before republishing it.

Note All data that has been entered at the Web site for the form will be discarded when you republish the form. Be sure to collect all the data before republishing the form.

4. Click **republish** to post the updated form on the Web site.
5. Click **Yes** when asked to confirm.

▼ **To remove a form from eOmniForm.com:**

1. Open the form you want to remove.
2. Click the **Online Forms** tab and sign in.
3. Click **delete** to remove the form from the Web site.
4. Click **Yes** when asked to confirm.

The OmniForm Form itself is not actually deleted from your disk. It is only removed from the Web site.

▼ **To reset (permanently delete) data for a form on eOmniForm.com:**

1. Open the form for which you want to reset data.
2. Click the **Online Forms** tab and sign in.
3. Click **reset** to remove all data that has been entered for the form at the Web site.
4. Click **Yes** when asked to confirm.

All data that has been entered and stored at the Web site for this form is deleted. This does not affect the records in the OmniForm database on your disk.

▼ **To recover data (collect all data again) for a form on eOmniForm.com:**

1. Open the form for which you want to recover data.
2. Click the **Online Forms** tab and sign in.
3. Click **options** to go to the options page for that form.
4. Click **Recover Data** to mark all data as being collectable again.
5. Click **Collect** to collect all data records for the form.

All data is automatically downloaded into your form database even if you had previously collected that data.

▼ To set options for a form on eOmniForm.com:

1. Open the form for which you want to select options.
2. Click the **Online Forms** tab and sign in.
3. Click **options** to display the currently selected options for that form.

You can assign a password to your form and then give that password to people who will be filling out the form. This password setting does not affect your eOmniForm.com password.

After someone fills out and submits your form, they will see a confirmation page with a *Continue* link on it. Enter the desired Web page destination for the *Continue* link here.

For example, if you want them to return to your company's Web page, you would enter your company's Web address.

Options for form **Order Form**

Current Password:

New Password:

Confirm Password:

Continue Location:

This is the web address that people filling out your form go to after they submit their form.
For example, if you want people to go to your own website, you would enter: http://www.yourwebsite.com.
Make sure to enter the full URL including the prefix http://

Notification Address:

You will always receive notification of the presence of form data at your primary email address you provided when you established your account. If you want someone else to also be notified, please enter their email address here.

Notify me when I receive more records.

Notify me every days when I have records to download.

Recover data from form **Order Form**

To recover previously collected data, click Recover Data. Then you can collect all the records on this form once again.

For Help, press F1 USD NUM

Click *Recover Data* to mark all data as collectible again.

Click *Close* when you are finished changing options for the form.

4. Change the options as desired and click **Close**.

Accessing eOmniForm.com from a Web Browser

You can view all your online forms and account information by entering **www.eOmniForm.com** directly in your Web browser. You will be prompted to sign in using your same user name and password.

You should use **www.eOmniForm.com** directly if you want to change your password or other account information. Also, if you lose your form on your computer, you can recover and download the form directly from the Web site.

For more information on using the eOmniForm.com Web site, please see the online assistance provided at the site.

Note You cannot publish forms or collect data directly from the **www.eOmniForm.com** Web site. Use OmniForm's **Online Forms** view instead.

Publishing Forms on Your Own Web Site

You can use OmniForm to publish forms on your own Web site if you have Microsoft's Web Publishing Wizard installed on your system.

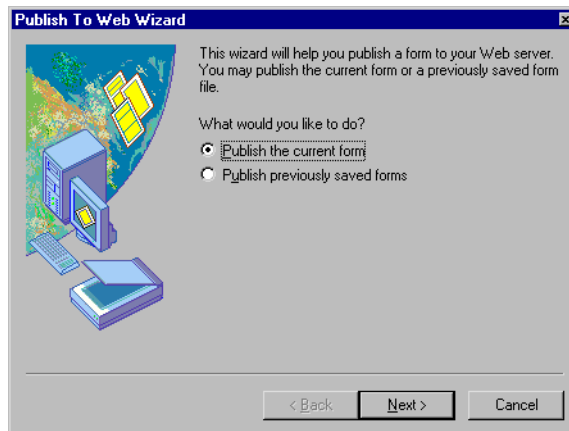
Note Depending on your Web server, you might need Microsoft FrontPage extensions installed in order to work with Microsoft's Web Publishing Wizard.

Publishing forms on your own Web site requires some technical knowledge about Web publishing and using the Web Publishing Wizard. For more information, please refer to your Microsoft documentation.

▼ **To publish a form on your own Web site:**

1. Open the form that you want to publish.
2. Choose **Publish to a Web Site...** in the Tools menu.
3. Click **OK** in the message that asks if you want to continue.

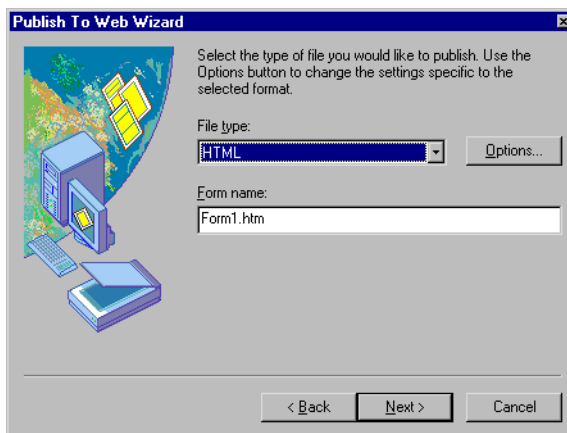
The Publish to Web Wizard dialog box appears.



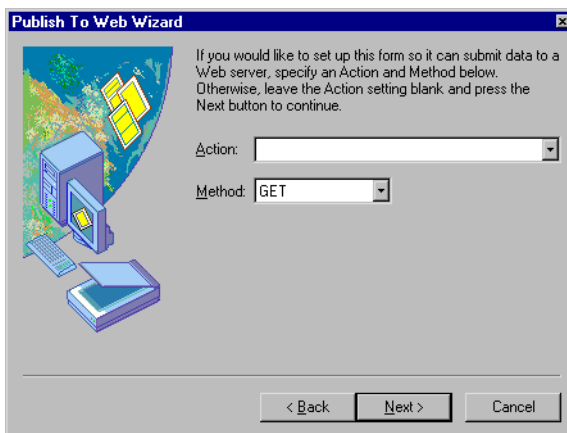
4. Select whether you want to publish the current form or previously saved forms and click **Next**.

Note If you select **Publish previously saved forms** and you enter a folder name as the form name, all files in that folder will be published to the Web. If you also select **Include subfolders**, all subfolders in that folder will be published to the Web.

5. If you selected **Publish the current form**, select a file type, enter a file name in the dialog box that appears, and click **Next**.



6. If you selected OFML, HTML, or PDF as the file type, enter an action and select a method in the dialog box that appears.



7. Click **Next**.
8. Follow all the instructions in Microsoft's Web Publishing Wizard to finish publishing your form to the Web.

Chapter 7



Technical Information

This chapter provides troubleshooting tips and other technical information about using OmniForm. Please also look in the Release Notes, Help topics, and ScanSoft Web pages (www.scansoft.com) for updated information about OmniForm.

It includes the following topics:

- ◆ Troubleshooting
- ◆ Improving Performance
- ◆ OmniForm Compatibility and Limits
- ◆ Uninstalling OmniForm

Troubleshooting

Although OmniForm is designed to be easy to use, problems sometimes occur. Many of the error messages contain self-explanatory descriptions of what to do: check connections, close other applications to free up memory, and so on. Sometimes that is all the troubleshooting help you need.

Please see your Windows documentation for information on optimizing your system and application performance.

Solutions to Try First

Try these solutions if you experience problems starting or using OmniForm:

- ◆ Make sure that your system meets all requirements listed under System Requirements in Chapter 1.
- ◆ Make sure that your scanner is plugged in and that all cable connections are secure.
- ◆ Visit the support section of ScanSoft's Web site at **www.scansoft.com**. It contains information on using OmniForm and troubleshooting assistance.
- ◆ Turn off your computer and your scanner, turn your scanner back on, and then restart your computer. Make sure other applications are functioning properly.
- ◆ Use the software that came with your scanner to verify that the scanner works properly before using it with OmniForm.
- ◆ Make sure you have the correct drivers for your scanner, printer, and video card. Go to **www.scansoft.com** and click **scanner guide** for more information.
- ◆ Run ScanDisk for Windows 95, 98 or ME, or Check Disk for Windows NT and Windows 2000 to check your hard disk for errors. See the Windows Help for more information.
- ◆ Defragment your hard disk. See the Windows Help for more information.
- ◆ Uninstall and reinstall OmniForm, as described on page 120.

Low Memory Problems

OmniForm may run poorly under low-memory conditions. This may be indicated by various error messages, or if OmniForm works slowly and accesses the hard drive often. Try these solutions for low memory conditions:

- ◆ Restart your computer.
- ◆ Close other open applications to free up memory.
- ◆ Defragment your hard disk to free up contiguous blocks of disk space. See the Windows Help for instructions.
- ◆ Delete files to increase the amount of free hard disk space, as described in the next section.
- ◆ Increase your computer's physical memory (RAM). More memory optimizes OCR performance. See System Requirements in Chapter 1 for more information.

Low Disk Space Problems

Problems might occur if your system runs low on free disk space. Try these solutions for low disk space problems:

- ◆ Empty the Windows Recycle Bin.
- ◆ Close all open applications and delete the TMP files in the Temp folder. This folder is usually located in your Windows folder.
- ◆ Run ScanDisk for Windows 95, 98 or ME, or Check Disk for Windows NT or Windows 2000 to check for errors that may be using disk space. See the Windows Help for instructions.
- ◆ Back up unneeded files onto floppy disks or other media and delete them from your hard disk.
- ◆ Remove Windows applications that you do not use.
- ◆ Defragment your hard disk. See the Windows Help for instructions.
- ◆ Clear the cache for your Web browser and limit its size. See your browser documentation for information.

Improving Performance

If you scan typeset, high-quality printed paper forms, text recognition and form conversion accuracy should be very high. With lesser-quality pages, text recognition might not be as accurate. Following are some tips for improving scanning and recognition performance.

Document Quality

OmniForm recognizes characters in almost any font from 6 to 72 points in size. However, keep the following in mind when using OmniForm:

- ◆ The print should be reasonably clean and crisp. Characters must be distinct; they should be separated from each other and not blurry or overlapping.
- ◆ The document should be free of notes, lines, or doodles. Anything that is not a printed character slows recognition, and any character distorted by a mark will be unrecognizable.
- ◆ The document font should be non-stylized; for example, OmniForm may not recognize the Zapf Chancery font accurately.
- ◆ Forms with underlined text should have the lines placed below the text and not touching it for best results. It is difficult to recognize underlined text because the underline overprints the descenders on the letters g, j, p, q, and y, changing their shape.

Scanning Angle

Make sure that each document is positioned correctly in your scanner and is not crooked. If there seem to be a lot of errors, and you notice the page is not straight, adjust the page and scan it again.

Scanner Glass Clarity

The sheet of glass on the flatbed of the scanner must be clear. If it gets dirty, wipe it gently with a soft, damp, lint-free cloth or tissue. Be sure that it is completely dry before you put pages on it. See your scanner documentation for more information on proper scanner maintenance.

Paper Transparency

Some paper is thin enough that the scanner sees text printed on the opposite side of a two-sided page. This can interfere with scanning accuracy. To correct this problem, put a black piece of paper behind the page.

OmniForm Compatibility and Limits

This section lists OmniForm's supported databases and graphic formats, as well as its currently known limits.

Supported Databases

OmniForm uses industry-standard ODBC to exchange information with the following databases:

- ◆ Microsoft Access (2.x or higher)
- ◆ dBASE (III or higher)
- ◆ Excel (3.0 or higher)
- ◆ FoxPro (2.0 or higher)
- ◆ Paradox (3.x or higher)
- ◆ Microsoft SQL Server (6 or higher)
- ◆ Text-based and CSV files

Supported Graphic Formats

OmniForm can import the following file types as graphic elements or fillable graphic fields:

- ◆ BMP
- ◆ GIF
- ◆ JPEG
- ◆ PCX
- ◆ TIFF
- ◆ Macintosh PICT

OmniForm Limits

The following are limits in OmniForm.

Pages in a form	100 pages
Forms open at one time	20
Records in a database	10,000 or approximately 5.4 MB of data across all records
Length of Help message that can be placed in for a field	100 characters
Number of choices allowed in a list of choices autofill field	500 choices, each up to 100 characters long
Number of fields allowed per form published on eOmniForm.com	255 fields

Uninstalling OmniForm

Sometimes uninstalling and then reinstalling OmniForm will solve a problem.

Note	To uninstall from Windows NT or Windows 2000, you must be logged into your computer with administrator privileges.
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▼ To uninstall OmniForm:

1. Close OmniForm.
2. Click **Start** in the Windows taskbar and choose **Settings > Control Panel**.
3. Double-click the **Add/Remove Programs** icon.
4. Select **OmniForm** and click **Add/Remove**.
5. Click **Next** in the dialog box that appears.
6. Select **Remove** and then click **Next**.
7. Follow instructions until the process is finished.



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