

ScanSoft®



OmniForm® **FILLER 5.0**

***User's Guide
for Filling Forms and Managing Data***

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OmniForm™ Filler

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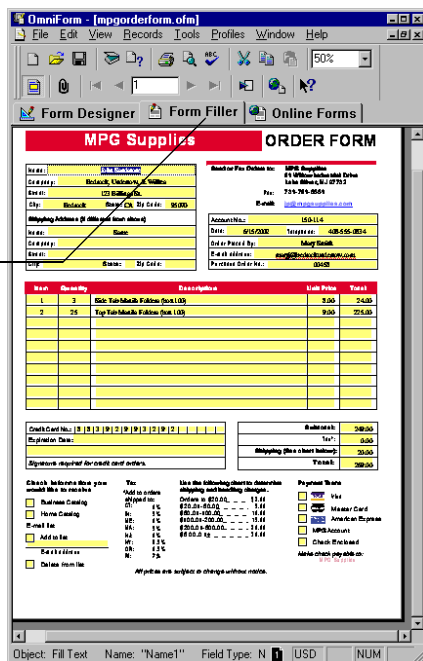
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This user's guide is intended for the person who will be filling out electronic forms and managing form data records in an OmniForm® database. It provides you with installation and setup instructions, task-oriented instructions for filling and managing forms, and technical information.

OmniForm Filler and OmniForm's Form Filler view make it easy to fill and manage electronic forms. You can enter data on forms, manage form records in a database, import and export form information, print forms, and mail forms to other users.



Note This guide is designed to be used with both the standalone OmniForm Filler application and the Form Filler view that is part of the full version of OmniForm. These both share the same user interface and features.

OmniForm Filler Features

The following is a list of features that are available with OmniForm Filler and OmniForm's Form Filler view.

Form Filling

You can easily fill out information on a form and then print or mail it. For more information, see Chapter 2.

Automatic Data Entry with User and Client Profiles

The User Profile and Client Profile features save you time by automatically filling out repetitive information on forms for you. A **User Profile** remembers information about you and your business. A **Client Profile** remembers information about other people, such as your customers, employees, or family members. For more information, see Chapter 2.

OmniForm Database

The information that you enter on a form is automatically saved and stored as a record in an OmniForm database. You can create, duplicate, search, and sort records, and import and export data to and from other databases. For more information, see Chapter 3.

File Attachments

You can attach files to your form records. For example, you might want to attach scanned receipts when you fill out expense forms. For more information, see page 30.

Information Import and Export

You can import information from another OmniForm database or from other external database sources into your current database. You can also export information from your current database for import into other supported databases. For more information, see Chapter 3.

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 Filler on your computer. You do not need to read this chapter if you have the full version of OmniForm. Instead, read Chapter 1 of the *OmniForm User's Guide*.
- ◆ **Chapter 2 — Working with Forms.** Describes how to open, fill out, and work with forms in OmniForm Filler and OmniForm's Form Filler view.
- ◆ **Chapter 3 — Managing an OmniForm Database.** Describes how to work with OmniForm databases and data records.
- ◆ **Chapter 4 — 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 Filler Help** (or **OmniForm Help**) in the Help menu. Or, press the F1 key.
- ◆ **OmniForm User's Guide** — Introduces you to the basics of using OmniForm's form design and distribution tools (provided with the full OmniForm version only).
- ◆ **Release Notes** — Provide important information about this version of OmniForm Filler available electronically on the installation CD.
- ◆ **Product Support** — Additional technical support in the form of technical notes, frequently asked questions, software updates, and more. Choose **Product Support** in the Help menu.
- ◆ **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 Filler software.

It includes the following topics:

- ◆ System Requirements
- ◆ Upgrading from a Previous Version of OmniForm Filler
- ◆ Installing OmniForm Filler
- ◆ Starting OmniForm Filler

Note You do not need to install OmniForm Filler if you already have the full version of OmniForm installed, because the full version includes Form Filler as part of its regular installation. For instructions on installing the full version of OmniForm, please see Chapter 1 in the *OmniForm User's Guide*.

System Requirements

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

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

Upgrading from a Previous Version of OmniForm Filler

If you have a previous version of OmniForm Filler installed, it is recommended that you uninstall that version before installing your new version. 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 might 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.

Installing OmniForm Filler

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

▼ Before installing OmniForm Filler:

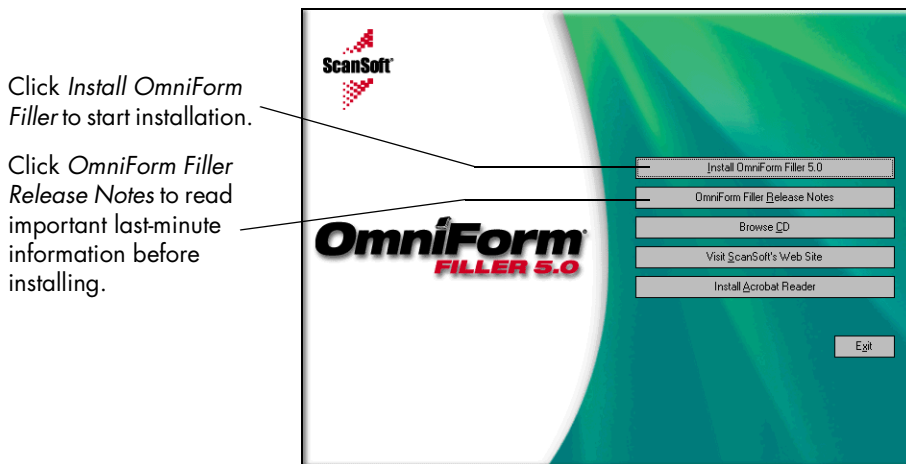
- ◆ Log into your computer with administrator privileges if you are installing on Windows 2000 and Windows NT.
- ◆ Back up your OmniForm Forms.
- ◆ Uninstall any previous versions of OmniForm Filler.
- ◆ Close all other applications, especially anti-virus software.

▼ To install OmniForm Filler:

1. Insert OmniForm Filler'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 Filler 5.0** to start installation.

3. Follow the installation instructions on each screen.

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

Note If you are experiencing a problem with OmniForm Filler after installation, sometimes uninstalling and then reinstalling OmniForm Filler will solve the problem. See page 74 for more information.

Starting OmniForm Filler

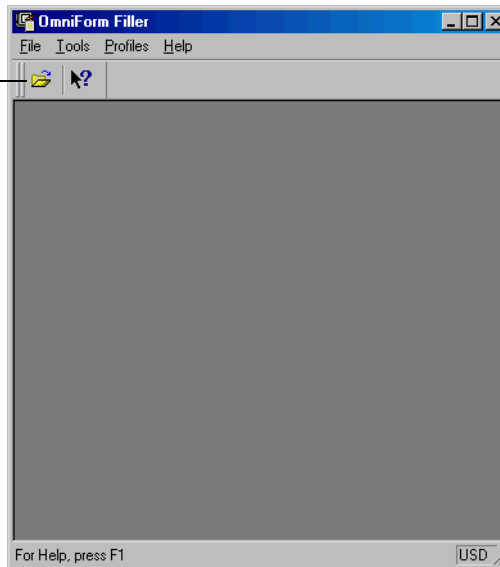
- ▼ To start OmniForm Filler, do one of the following:

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



The OmniForm Filler desktop looks like this when you first open it:

Click the *Open* button to open a form.





Click the Open button or choose **Open...** in the File menu to open 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.

After you open a form, more OmniForm tools appear on the desktop:

Standard buttons appear for printing, spell checking, resizing the view, and other tasks.

Use this button to highlight fillable fields.

Use these buttons to scroll through records in your database.

[illegible]

Please read Chapter 2 for more information on working with forms in OmniForm Filler and OmniForm's Form Filler view.

Chapter 2



Working with Forms

This chapter describes how to work with forms in OmniForm Filler and OmniForm's Form Filler view.

It includes the following topics:

- ◆ Opening a Form for Filling
- ◆ Moving Through Fields on a Form
- ◆ Working with Different Field Types
- ◆ Using the Type Ahead Feature
- ◆ Shrinking Text to Fit Fields
- ◆ Adding File Attachments to Form Records
- ◆ Entering Data Automatically with User Profiles
- ◆ Entering Data Automatically with Client Profiles
- ◆ Spell Checking Forms
- ◆ Saving Forms
- ◆ Printing Forms
- ◆ Emailing Forms

Opening a Form for Filling

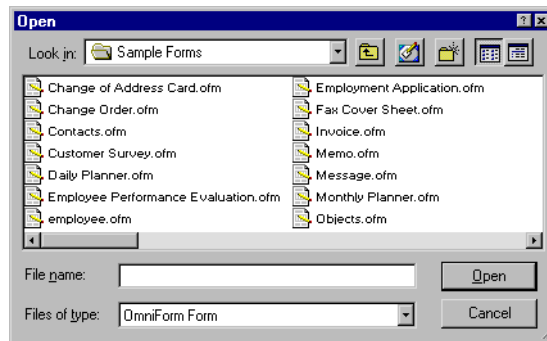
You can have multiple forms open at the same time. Use the Window menu to switch between open forms.

▼ To open a form for filling:

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



The Open dialog box appears.



3. Select **OmniForm Form** as the file type.
4. Locate and select the desired form.
5. Click **Open**.
6. If you have the full version of OmniForm, click the **Form Filler** tab.

The form opens, and is ready for you to create a new record. For information on working with records in an OmniForm database, see Chapter 3.

Tip

Make sure **Highlight Fillable Fields** is selected in the View menu to highlight fillable fields in yellow.

Moving Through Fields on a Form

After opening a form in OmniForm Filler or OmniForm's Form Filler view, click in any field to place the cursor there and start entering the desired information. You can continue to move the cursor from field to field using your mouse. Or, use the following keyboard combinations to move the cursor within a form.

Action	Keyboard Combination
Place the cursor in a field	When a form first opens, press Tab to place the cursor in the first field.
Next field	Press Tab
Previous field	Press Shift-Tab
Next line in a fill text field	Press Enter to move to the next line in a multiple-line fill text field
End of a line in a fill text field	Press End
Beginning of a line in a fill text field	Press Home
End of all text in a fill text field	Press Ctrl-End
Beginning of all text in a fill text field	Press Ctrl-Home
Next word in a field	Press Ctrl-right arrow
Previous word in a field	Press Ctrl-left arrow

An OmniForm Form can have a lot of different field types. The following illustration shows an example of some of the common fields you might find when filling out forms.

For information on designing these types of fields in OmniForm, see the *OmniForm User's Guide*.

Fillable Text Fields

You can enter characters in a fillable text field such as letters, numbers, symbols, and dates.

Name Enter text directly in
a fillable text field.

Note Make sure **Highlight Fillable Fields** is selected in the View menu to highlight fillable fields in yellow.

Comb Fields

A comb field is a fillable text field that is broken into separate segments for entering a set number of characters. You can enter any characters in a comb field that are appropriate to the field. Comb fields are commonly used for phone numbers and zip codes.

Zip Code: -

You do not have to tab from element to element in a comb field. Just type the required amount of information, and OmniForm automatically moves to the next comb element.

Check Box Fields

Check boxes are commonly used for Yes/No questions and for selecting an item in a group. Click a check box to fill it. A filled check box field can contain a check mark, an **X** mark, or a solid fill:

Depending on how it was designed, a filled check box can appear three different ways.

Yes	☒	No	☐
Yes	☒	No	☐
Yes	☒	No	☐

Check boxes might be grouped so that only one can be selected at a time. In this case, selecting one check box automatically deselects another check box in the group.

How often do you eat out?

☒	everyday
☐	2-5 times a week
☐	once a week
☐	once a month

Circle Text Fields

A circle text field allows you to indicate your selection by making a circle around it. Click a circle text field to make a selection.

Circle text fields might be grouped so that only one can be selected at a time. In this case, selecting one circle text field automatically deselects another circle text field in the group.

A border appears when you click a circle text field

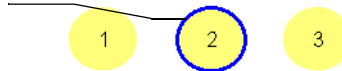


Table Fields

A table field consists of individual cells, which are generally fillable text fields. You can enter characters in these cells just as you would in regular text fields.

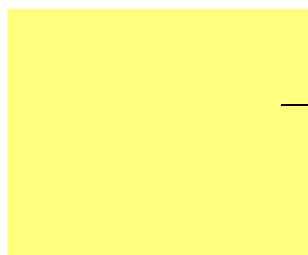
A table might also contain other field types, such as check boxes.

Task	Assigned To	Done
Tune piano	John C.	✓
Paint walls	Jerry G.	✓
Groom horses	Tina G.	
Make deliveries	Pat G.	✓
Milk cows	Colman M.	
Collect recycling	Andrew A.	

Fillable Graphic Fields

A fillable graphic field allows you to insert a graphic into a form.

Insert a picture of the property:



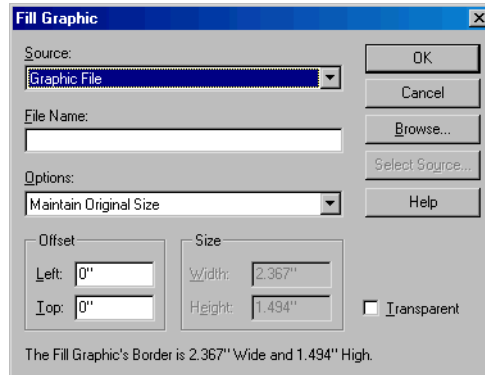
Click a fillable graphic field, and you will be prompted to select a source for the graphic.

You can import an existing graphic file or scan a picture directly into the field using a TWAIN-compatible scanner.

▼ **To import an existing graphic:**

1. Click the fillable graphic field.

The Fill Graphic dialog box appears.



2. Select **Graphic File** in the **Source** drop-down list.
3. Enter a file name in the **File Name** text box. Or, click **Browse...** to locate the file.
4. Select the desired size and other settings for the graphic.
Click **Help** to get more information on the available settings.
5. Click **OK**.

OmniForm imports the graphic into the form field.

▼ **To import a graphic from a TWAIN source:**

1. Click the fillable graphic field.

The Fill Graphic dialog box appears.

2. Select **TWAIN** in the **Source** drop-down list.
3. Click **Select Source** to open the Select Source dialog box.
4. Select your TWAIN source and click **OK** to return to the Fill Graphic dialog box.

5. Type a file name in the **File Name** text box.

The graphic will be saved with this file name after it is scanned.

6. Select the desired size and other settings for the graphic.

Click **Help** to get more information on the available settings.

7. Place the page with the graphic in your scanner, making sure it is aligned correctly.

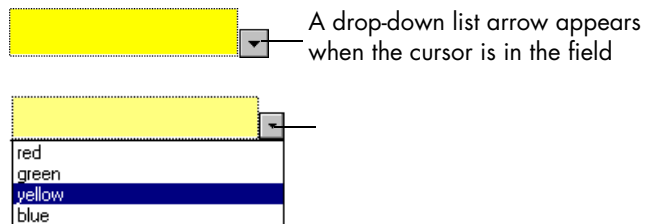
8. Click **OK**.

OmniForm scans the graphic into the form field.

Tip To delete a graphic and leave the fillable graphic field empty, click the field and then select **None** in the **Source** drop-down list in the Fill Graphic dialog box.

Drop-Down List Fields

A drop-down list contains a group of selectable entries.



Digital Signature Fields

A digital signature field allows you to lock specific fields on a form using a password. This authenticates a form and protects its data from unauthorized modification. For example, an expense report form might require a signature. Once “signed,” certain fields on the form such as expensed items might be locked. You can only unlock fields and change the data in them if you have the correct password.

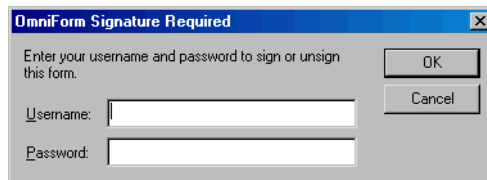
Digital signature fields can be set up to work with OmniForm passwords or with a more secure level of protection provided by an outside authentication service (Entrust or Microsoft PKI). Check with the form designer or database administrator for information about how the digital signatures were set up on a form.

▼ To sign a digital signature field on a form:

1. Click the signature field.

A dialog box appears and prompts you to enter your username and password. If it is an OmniForm signature field, make sure you have access to the appropriate OmniForm database.

The dialog box that appears depends on the type of signature field it is. This example shows the dialog box for an OmniForm signature field. If the digital signature field type is Entrust or Microsoft PKI, please refer to their documentation for more information on how they work.



2. Enter your user name and password.
3. Click **OK**.

To unsign a signature field, click it and enter your password again.

Note After a signature field is signed, that form’s design becomes locked. All records must be unsigned before the form design can be changed. Or, save the form with a different name, and delete all of its records.

Verifying Digital Signature Fields

Digital signature fields are only of value if you can verify that the signatures are valid. After a digital signature field is signed, the authentication process tries to verify the signature to ensure that it is valid.

▼ **To see the verification status of a signed digital signature field:**

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.
2. Choose **Field Security** in the View menu if it is not already turned on.

Icons appear next to signed fields indicating whether signatures have been verified or not. A pen with a check mark indicates that the signature was verified to be valid. A pen with a question mark indicates the signature cannot be verified.

A pen with a check mark indicates that the signature was verified to be valid. (A pen with a question mark indicates that the signature cannot be verified.)

Fields that are locked by the signature are highlighted with a blue border.

Signature: Lola Dulce 

Authorized amount: \$10,000

If a signature field cannot be verified, it could be for one of these reasons:

- ◆ The form's data has changed since the form was first signed.
- ◆ The form's design has changed since the form was first signed.
- ◆ The signer of the form could not be identified, possibly because the OmniForm user database or authentication service is not accessible, or because the authentication service could not verify the signer.
- ◆ The signer of the form could not be identified, possibly because the user password was changed since the form was first signed. (This reason is only applicable to OmniForm signature fields.)

Note You can also choose **Security...** in the Tools menu to get the verification status for signed signature fields. If you have the full version of OmniForm, make sure Form Filler view is open before verifying signatures this way.

Fields with Validation Settings

Some fillable text fields might be designed with validation settings such as:

- ◆ Requiring information to be entered so that the field is not left blank
- ◆ Requiring specific information to be entered
- ◆ Requiring information to be entered from a list of choices

For example, you might be required to enter a valid date in a **Date** field. You would receive an error message from OmniForm if you attempted to enter anything other than a valid date. Depending on how the field was set up, you might be allowed to override the validation requirement.

Fields Defined by Calculations

Sometimes fields are designed with calculations that compute and fill information for you automatically.

In the example below, the *TOTAL* field automatically added the amounts entered in the first and second fields. The *TOTAL* field would increase automatically if amounts were entered in the third and fourth fields.

	\$5.95
	\$125.95
TOTAL:	\$131.90

The calculation in this field automatically computes the total for you.

Using the Type Ahead Feature

As you begin to enter a word on a form, OmniForm can automatically complete the word for you if there is previously filled information that matches the word you are entering. For example, if you had previously entered the name *John* in a field, as soon as you enter *J* in another field, OmniForm would automatically enter *John* for you.

▼ **To turn the type ahead feature on or off:**

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

The Options dialog box appears.

2. Click the **Filling** tab.
3. Select **Enable Type Ahead** if you want to use this feature. Deselect it if you do not want to use this feature.
4. Click **OK**.

Shrinking Text to Fit Fields

The text you enter might not always fit in the text fields provided on a form. To fix this, OmniForm can automatically shrink your text to make it fit in the fields.

▼ **To turn the shrink text feature on or off:**

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

The Options dialog box appears.

2. Click the **Filling** tab.
3. Select **Automatically shrink text to fit within fields** if you want to use this feature. Deselect it if you do not want to use this feature.
4. Click **OK**.

Adding File Attachments to Form Records

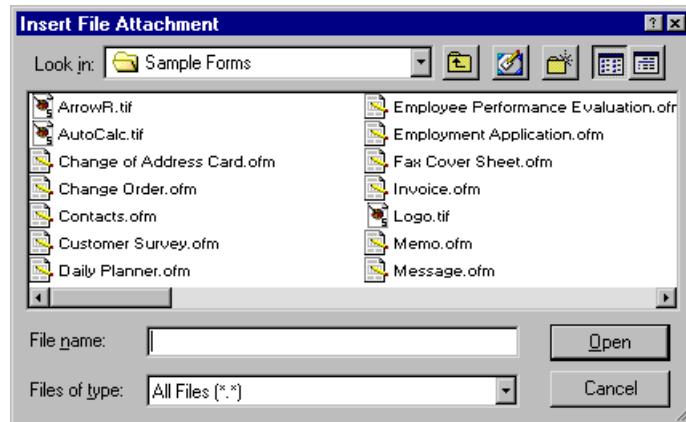
You can attach files to your form records. For example, you might want to attach scanned receipts to your expense records.

▼ To attach a file to a form record:

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.
2. Click the **Insert File Attachment** button or choose **Insert File Attachment...** in the File menu.



The Insert File Attachment dialog box appears.



3. Locate and select the file you want to attach.

4. Click **Open**.

The selected file is attached, and an icon is displayed for it in an attachment window below the form.

An icon represents the file attachment. Double-click it to open the file in its own application. Right-click the icon to open, save, or remove the attachment.

OmniForm - [Travel Expense Report.afm]

File Edit View Records Tools Profiles Window Help

68%

Form Designer Form Filler Online Forms

TRAVEL EXPENSE REPORT

Employee Name: Michael Jones

Employee Number: Department:

Business Purpose: Visit European Office

Date	Location	Total
	Air, Rail, Bus, Etc.	
	Car Rental	
	Taxi, Limousine	
	Automobile Expenses	
	Parking, Tolls	
	Lodging	
	Breakfast	
	Lunch	
	Dinner	
	Phone	
	Entertainment	
	Other*	
	Total	

*Other (include description and amount):

Less Cash Advance

Balance Due Employee \$0.00

Balance Due Company \$0.00

Employee Signature

Date

Supervisor Signature

Date

Budget Receipts.tif

For Help, press F1

USD NUM

An attachment icon in the status bar indicates when form records have attachments.

▼ To show or hide file attachments:

1. Choose **View Attachments** in the View menu to show the attachment window.
2. Choose **View Attachments** in the View menu again to hide the attachment window.

Entering Data Automatically with User Profiles

A **User Profile** is a convenient feature that remembers and stores information about you when you are filling out a form. This information can then be entered automatically each time you fill out forms for yourself.

This example illustrates how a User Profile would work to automatically insert your name into a form.

In Form Designer:

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

The screenshot shows a form titled 'ORDER FORM' in a design view. The 'Name' field under the 'BILL TO' section is highlighted in orange. Below the form, there is a table with columns 'Quantity', 'Item #', 'Description', 'Unit', and 'Amount'. At the bottom, there are checkboxes for 'Print', 'Save', and 'Exit'.

In Form Filler:

- ② When you open the form to fill it out, you see that the **Name** field is a User Profile field because it is highlighted in orange.

The screenshot shows the same 'ORDER FORM' in a fillable view. The 'Name' field is highlighted in orange. The form includes fields for 'BILL TO' and 'SHIP TO' information, a table for items, and checkboxes for 'Print', 'Save', and 'Exit'.

- ③ Select your User Profile to use with this form.

In Form Filler:

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

The screenshot shows the 'ORDER FORM' in a fillable view. The 'Name' field is now populated with the text 'John Doe'. The form includes fields for 'BILL TO' and 'SHIP TO' information, a table for items, and checkboxes for 'Print', 'Save', and 'Exit'.

OR

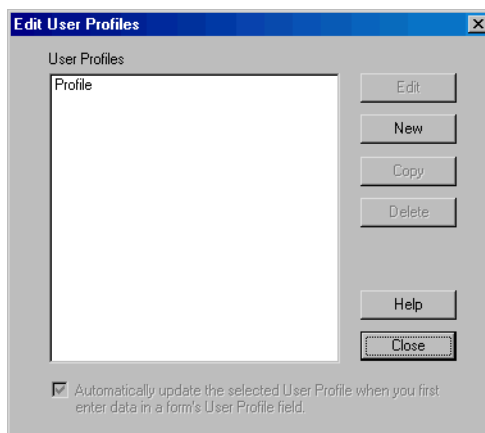
- ④ If you have not yet added your name to your User Profile, then you must enter your name on the form manually. After entering your name, it will automatically be added to the **Full Name** field in your User Profile (as soon as you switch records).

In the User Profile:

The screenshot shows the 'User Profile' window with the 'Basic Personal Information' tab selected. The 'Full Name' field is highlighted in orange. A callout box points to this field with the text 'Full Name User Profile field'. The window includes a table for items and checkboxes for 'Print', 'Save', and 'Exit'.

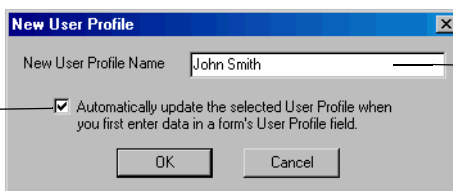
▼ **To create a User Profile:**

1. Choose **Edit User Profiles...** in the Profiles menu.



2. Click **New**.

Select this option if you want data to be added automatically to the User Profile when it is first entered. (Subsequent changes would not be added automatically.)

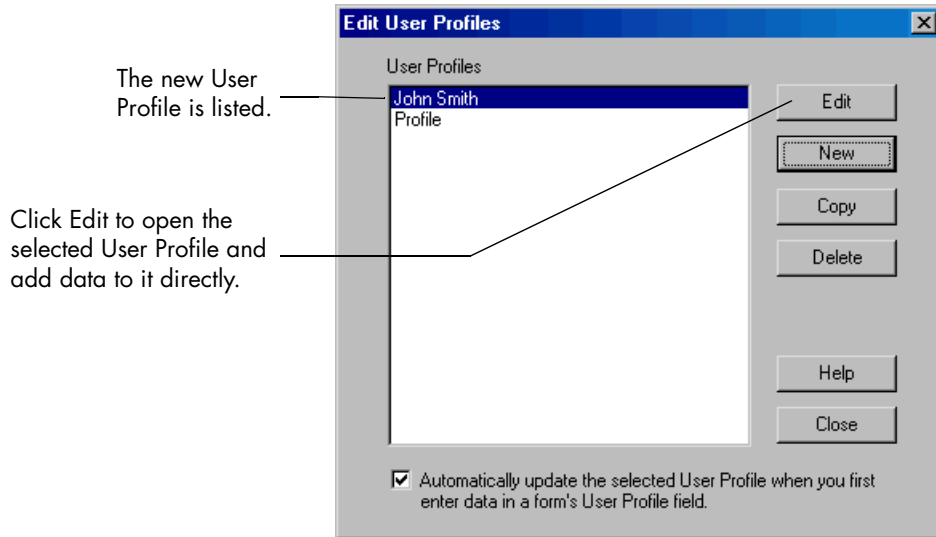


Type the desired name for your User Profile.

3. Type a name for your User Profile and click **OK**.

4. Click **OK** in the confirmation dialog box.

The Edit User Profiles dialog box now lists your new User Profile.



5. Click **Edit** to edit the User Profile directly. See the next section for more information.
6. Click **Close** to close the dialog box.

The User Profile is now selectable for any form by using the **Select User Profile > [User Profile name]** command in the Profiles menu.

Note User Profiles will only work on forms that were designed with fields that can receive User Profile information. To find out if a form has User Profile fields, choose **Highlight User Profile Fields** in the Profiles menu. User Profile fields are highlighted in orange. For more information on designing a form with User Profile fields, please see the *OmniForm User's Guide*.

▼ **To select a User Profile for filling out a form:**

1. Open the desired form.
2. Choose **Select User Profile > [User Profile name]** in the Profiles menu.

3. Click **Yes** if you are asked to confirm the selection.

The User Profile data will be filled into the applicable User Profile fields. If you do not yet have any data in the User Profile, see the next section for information on adding data.

Note To turn off a User Profile that is selected with a form record, choose **Select User Profile > None** in the Profiles menu.

Adding Data to User Profiles

There are two ways to add data to a User Profile:

- ◆ Add data to the User Profile as you fill out a form.
- ◆ Open the User Profile to add data directly.

▼ To add data to a User Profile as you fill out a form:

1. Open a form and select the desired User Profile to use with it. See page 34 for information on selecting a User Profile for a form.
2. Choose **Highlight User Profile Fields** in the Profiles menu to highlight all User Profile fields in orange.
3. Enter or modify the desired data in a User Profile field.

If this is the first time you are entering data in the field, that data will automatically be added to the User Profile when you switch records.

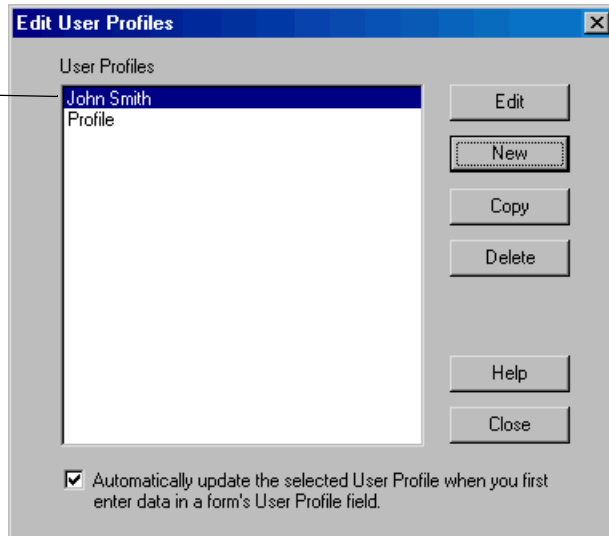
Note To add data to your User Profile right away, right-click the field and choose **Update User Profile** in the menu that appears. You can also choose **Update User Profile** if you change data that was previously entered and want to update the User Profile.

▼ **To add data to a User Profile directly:**

1. Choose **Edit User Profiles...** in the Profiles menu.

The Edit User Profiles dialog box appears.

Select the User Profile you want to edit and click *Edit*.



2. Select the User Profile you want to edit and click **Edit**.

The selected User Profile appears.

Click the page numbers to get to different types of data fields.

User Profile

There are two ways to edit data in the User Profile:

1. Add data to the User Profile as you fill out a form. When the User Profile is selected for a form, the information that you enter into that form's User Profile fields will be automatically saved into the User Profile.
2. Open the User Profile form and add data to it directly. The data indicates that you enter in the User Profile will be remembered and automatically fill the next time you select the User Profile for a form that is designed with User Profile fields.

There are two:

- Adding a field "Private" will add an extra level of protection when the User Profile is applied to forms. It requires you agree before you can correct that user data and provide User Profile data entered automatically on a form.
- Any changes you make to the User Profile will be saved automatically when you close the User Profile.
- You must close the User Profile before saving it with new records.
- You do not have to enter data into all the User Profile fields; only enter data in the fields that you want to be remembered for automatic filling.
- You can also modify the User Profile as you fill out a form that is designed with User Profile fields. First enter your data into a User Profile field on your form, right-click that field and choose "Update User Profile."
- Go to the form by clicking page numbers on the status bar on the bottom of your screen.

Page # Contents

2	Basic Personal Information
3	Company Information
4	Work History and Education
5	Business Information
6	Address
7	Phone and Email
8	Emergency Contacts and Family
9	Education
10	Medical History and History
11	Vehicle Information
12	Bank Information
13	Credit Card Information
14	Tax and Insurance
15	Custom Information

For Help, press F1

A User Profile form looks very similar to a regular OmniForm Form. It contains a standardized list of commonly used fields.

3. Enter the desired information in the fields that you want to be remembered.

You do not have to enter data in all the User Profile fields; only enter data in the fields that you want to be remembered for automatic filling.

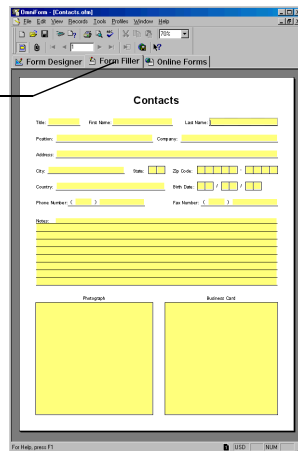
4. Click the **Private** option next to a field if you want to be prompted before it gets automatically filled on forms.
5. Choose **Close** in the File menu when you are finished entering information in your User Profile.

Entering Data Automatically with Client Profiles

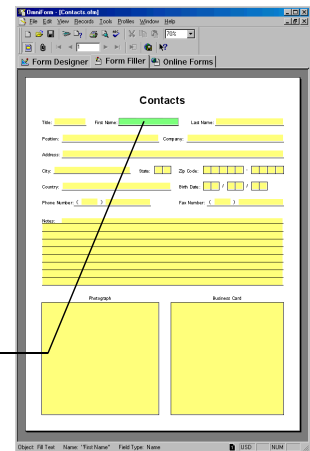
A **Client Profile** is a convenient feature that remembers and stores information about other people, such as your customers, employees, and family members. This information can then be entered automatically each time you fill out forms on their behalf. For example, if you have customers for whom you have to fill out forms, you can create a Client Profile that remembers and stores specific information for each customer. Each time you need to fill a form for a particular customer, you can apply their Client Profile to automatically fill in their data.

Using Client Profiles involves four steps:

① Open a form in OmniForm Filler (or OmniForm's Form Filler view).



② Set up fields on the form to receive Client Profile information. You need to do this only one time per form. See page 39 for more information.



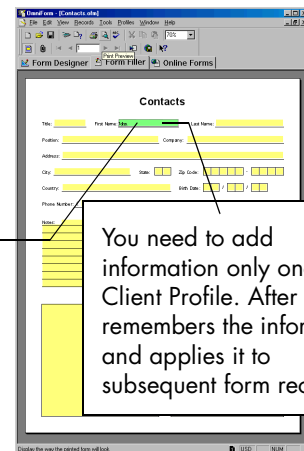
Client Profile fields are highlighted in green.

③ Create a Client Profile for a specific person and apply it to the form. See page 42 for more information.

Or, apply an existing Client Profile to the form. See page 44 for more information.

④ If the Client Profile does not yet have any information, you must add information to it by entering information into the Client Profile fields on the form. See page 45 for more information.

If the Client Profile already has information for the corresponding Client Profile fields, then the information automatically inserts into the fields on the form.



You need to add information only once to a Client Profile. After that, it remembers the information and applies it to subsequent form records.

▼ To set up fields on a form so that they can receive Client Profile information:

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.

If you have the full version of OmniForm, click the *Form Filler* tab.

For example, you might want to set up the *First Name* field on this form to receive information from Client Profiles.

The screenshot shows the OmniForm Filler application window. The title bar reads 'OmniForm - [Contacts.ofm]'. The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains various icons for file operations and editing. The 'Form Filler' tab is active, showing a form titled 'Contacts'. The form fields are as follows:

- Title: [text box]
- First Name: [text box]
- Last Name: [text box]
- Position: [text box]
- Company: [text box]
- Address: [text box]
- City: [text box]
- State: [dropdown menu]
- Zip Code: [text box]
- Country: [text box]
- Birth Date: [text box]
- Phone Number: ([text box]) [text box]
- Fax Number: ([text box]) [text box]
- Notes: [text area]
- Photograph: [large yellow box]
- Business Card: [large yellow box]

At the bottom of the window, there is a status bar with the text 'For Help, press F1' and currency/number indicators 'USD' and 'NUM'.

2. Select a field on the form that you want to set up to receive Client Profile information.

3. Choose **Link Field to Client Profile...** in the Profiles menu. (You can also right-click the field to choose this command.)

The Link Field to Client Profile dialog box appears.

The name of the currently selected field appears here.

The name of the Client Profile field to which you are linking appears here. Type in a new name or select a name from the list.

The master list of Client Profile fields appears here. This will be empty if this is the first time you are setting up a Client Profile field for the form.

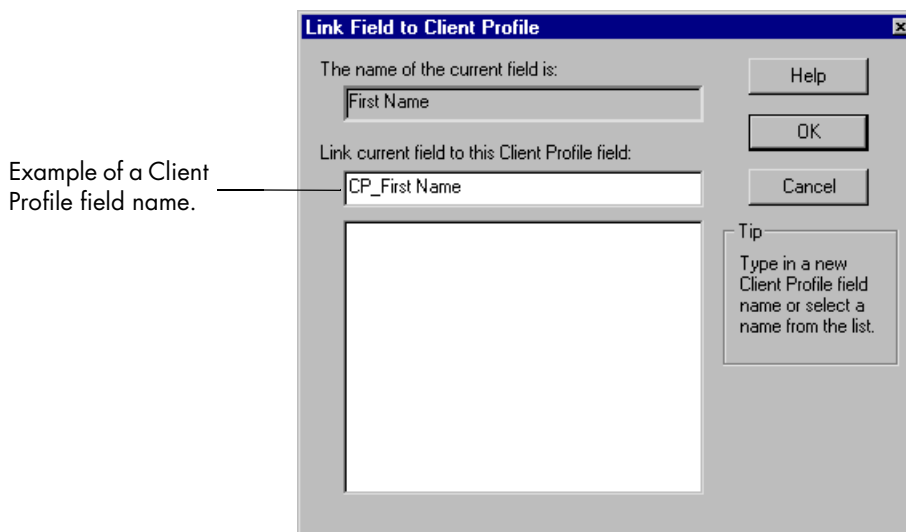
The dialog box is titled "Link Field to Client Profile". It contains the following elements:

- A label "The name of the current field is:" followed by a text box containing "First Name".
- A label "Link current field to this Client Profile field:" followed by a text box and a list box below it.
- A "Tip" box on the right side containing the text: "Type in a new Client Profile field name or select a name from the list."
- Buttons for "Help", "OK", and "Cancel" on the right side.

4. Type a name for the Client Profile field that you want to link with the selected form field. Or, if there is an existing Client Profile field that you want to link to, select it in the list box.

The name that you enter will become part of your master list of Client Profile fields, and will be selectable for future forms.

For example, if the form field is for a person's first name, you might enter *CP_First Name* as the Client Profile field name.



5. Click **OK**.

The field on the form turns green, which indicates that it has been linked, and is ready to receive Client Profile data. (For green highlights to appear, **Highlight Client Profile Fields** must be selected in the Profiles menu.)

6. Repeat this procedure, starting at step 2, for other fields that you want to link with Client Profile fields.

When you are finished, the form fields you linked are ready to receive data from any Client Profile that you apply. See page 42 for more information.

Note To turn off a Client Profile field link, right-click the field and choose **Unlink Field from Client Profile**.

▼ **To create a Client Profile and apply it to a form record:**

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.

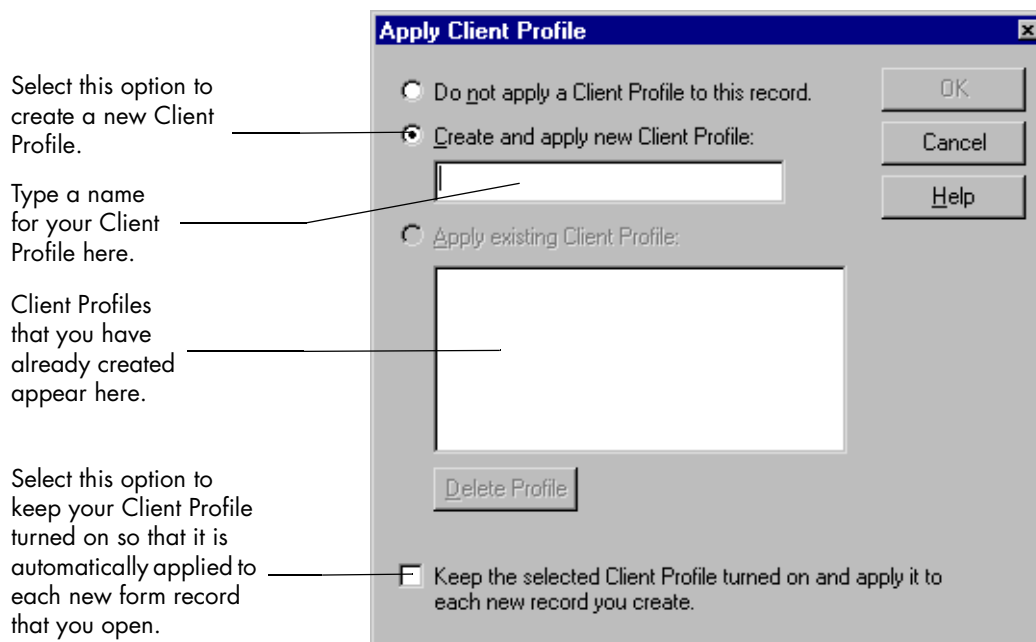
Fields that have been set up to receive Client Profile information are highlighted in green when **Highlight Client Profile Fields** is turned on in the Profiles menu. See page 39 for information on setting up fields.

The green color of this field indicates that it has been set up with a Client Profile field.

The screenshot shows the OmniForm Filler application window titled "OmniForm - [Contacts.ofm]". The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains various icons for file operations and form editing. The main window has three tabs: Form Designer, Form Filler (selected), and Online Forms. The form titled "Contacts" is displayed. It contains the following fields: Title, First Name (highlighted in green), Last Name, Position, Company, Address, City, State, Zip Code, Country, Birth Date, Phone Number, Fax Number, and Notes. At the bottom, there are two large yellow boxes labeled "Photograph" and "Business Card". The status bar at the bottom shows "Object: Fill Text Name: 'First Name' Field Type: Name" and currency symbols for USD and NUM.

2. Choose **Apply Client Profile...** in the Profiles menu.

The Apply Client Profile dialog box appears.



3. Select **Create and apply new Client Profile** and type the desired name for the Client Profile in the box below it.

For example, you might want to enter the name of the person for whom you are creating the Client Profile.

Note If you are planning to fill out a series of different forms for a particular person, select **Keep the selected Client Profile turned on and apply it to each new record you create** in the Apply Client Profile dialog box. The Client Profile that you select will stay on until you turn it off or select a different Client Profile.

4. Click **OK**.

Your new Client Profile is now ready for you to start adding data to it. See page 45 for more information.

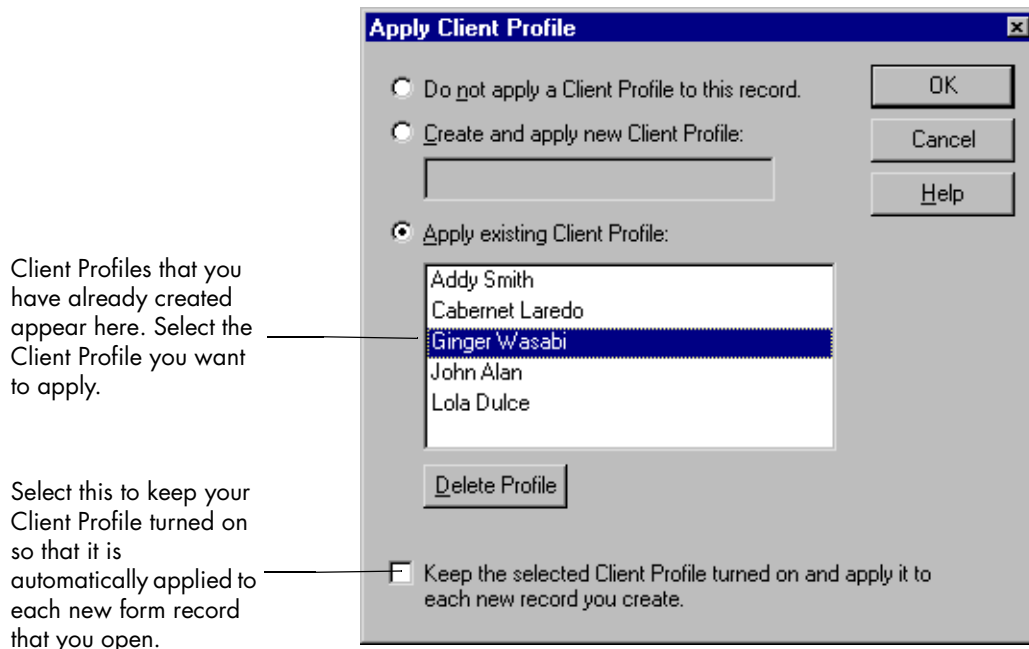
▼ **To apply an existing Client Profile to a form record:**

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.

Fields that have been set up to receive Client Profile information are highlighted in green when **Highlight Client Profile Fields** is turned on in the Profiles menu.

2. Choose **Apply Client Profile...** in the Profiles menu.

The Apply Client Profile dialog box appears.



3. Select **Apply existing Client Profile** and then select the name of the desired Client Profile in the list box.
4. Click **OK**.

The selected Client Profile automatically fills in its data in the appropriate form fields.

▼ To add data to a Client Profile:

1. Open the form in OmniForm Filler. Or, click the **Form Filler** tab in OmniForm.

Fields that have been set up to receive Client Profile information are highlighted in green when **Highlight Client Profile Fields** is turned on in the Profiles menu.

The green color of this field indicates that it has been set up with a Client Profile field.

The screenshot shows the OmniForm Filler application window titled 'OmniForm - [Contacts.ofm]'. The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains various icons for file operations and navigation. The 'Form Filler' tab is selected. The form itself is titled 'Contacts' and contains the following fields:

- Title:
- First Name: (highlighted in green)
- Last Name:
- Position:
- Company:
- Address:
- City:
- State:
- Zip Code:
- Country:
- Birth Date:
- Phone Number: ()
- Fax Number: ()
- Notes:
- Photograph:
- Business Card:

2. If you have not already done so, apply a Client Profile to this form. See page 42 for more information.

Be sure to apply the particular Client Profile to which you want to add data.

3. Enter information in a field that has been set up to receive Client Profile information.

The information that you enter into the field is automatically added to the current Client Profile. If you modify the information later, the modified information is automatically updated in the Client Profile.

4. Repeat step 3 until you have added the desired data to the Client Profile.

▼ **To turn off a Client Profile that is associated with a form record:**

1. Choose **Apply Client Profile...** in the Profiles menu.

The Apply Client Profile dialog box appears.

2. Select **Do not apply a Client Profile to this record.**
3. Click **OK.**

You will be asked whether or not you want to also delete the Client Profile data from the form fields.

Spell Checking Forms

Use OmniForm's spell checker to verify that the text you enter on a form is correct. You can use OmniForm's automatic spell checker or use a the Spelling command to open the regular spell checker.

Note Before you check spelling, make sure the correct language is selected for your form. Choose **Options...** in the Tools menu and click the **International** tab. For more information, see OmniForm's Help.

▼ **To turn on automatic spell checking:**

1. Choose **Options...** in the Tools menu.
2. Click the **Spelling** tab and select **Check spelling automatically.**

3. Click **OK**.

On your form, a red wavy line appears under possibly misspelled words and double entries.

4. Right-click an error and select the desired correction from the menu that appears.

▼ To spell check your form:

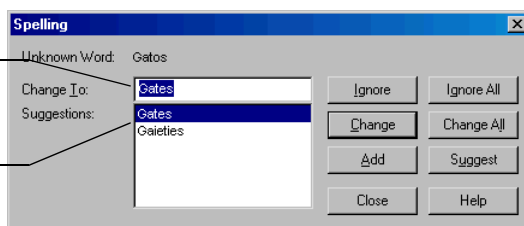


1. Click the Spelling button or choose **Spelling...** in the Tools menu.

The Spelling dialog box appears and displays the first questionable word.

The suggested spelling, if there is one, appears in the *Change To* text box.

Other suggested spellings appear in the *Suggestions* list box.



2. Click the desired action that you want to take for the questionable word.

3. Click **Close** when you are finished spell checking.

Saving Forms

OmniForm automatically saves form records as you fill them out. Saving occurs after various actions, such as moving from one record to another, printing or closing a form, and before importing or exporting data.

You only need to use the **Save** command in the File menu when:

- ◆ You have the full version of OmniForm and want to save changes that you made in Form Designer.
- ◆ You want to save information that you entered in the **Print offsets for data** option in the Print dialog box.

Tip Choose **Save As...** in the File menu if you want to save a form to another location or with a different file name.

Printing Forms

▼ To print your form:

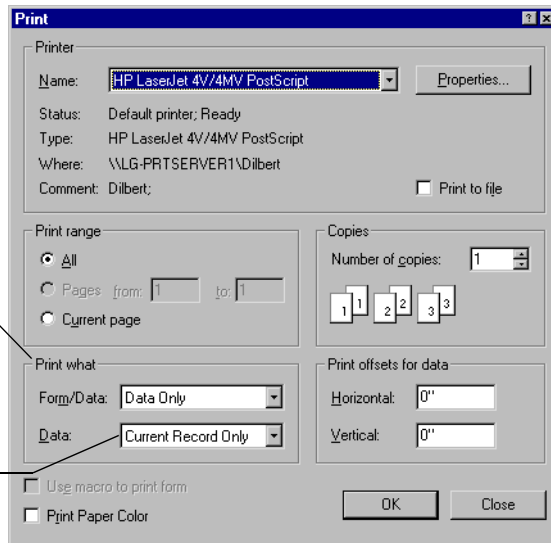


1. Click the **Print** button or choose **Print...** in the File menu.

The Print dialog box appears.

If you have the full version of OmniForm, these options appear only if you are printing from Form Filler view.

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



The Print dialog box is shown with the following fields and options:

- Printer:** Name: HP LaserJet 4V/4MV PostScript, Status: Default printer; Ready, Type: HP LaserJet 4V/4MV PostScript, Where: \\VLG-PRINTER1\DLbert, Comment: DLbert, Print to file checkbox.
- Print range:** All (selected), Pages from: 1 to: 1, Current page.
- Copies:** Number of copies: 1, 1 2 3 3.
- Print what:** Form/Data: Data Only, Data: Current Record Only.
- Print offsets for data:** Horizontal: 0", Vertical: 0".
- Use macro to print form** checkbox.
- Print Paper Color** checkbox.
- OK** and **Close** buttons.

2. Select the desired options for printing.

Tip If you are printing from OmniForm Filler or OmniForm's Form Filler view, you can choose to 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.

3. Click **OK** to start printing.

OmniForm prints your form with the selected settings.

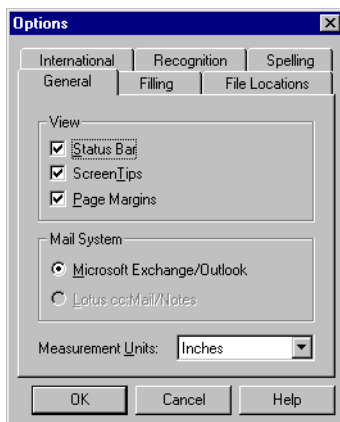
Emailing Forms

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 from OmniForm Filler or OmniForm's Form Filler view, you have the choice of sending it in the following ways:

- ◆ blank OmniForm Form
- ◆ OmniForm Form and data
- ◆ data only

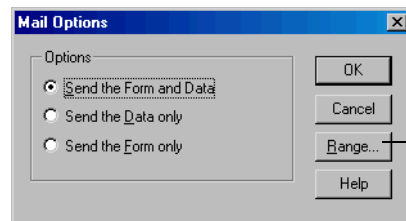
▼ To send a form as an email attachment:

1. Open the form that you want to send.

If you have the full version of OmniForm and want to send form data, click 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.



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.

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.
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.

Chapter 3



Working with OmniForm Databases

Every OmniForm Form is automatically set up with a searchable database. This chapter describes how to work with OmniForm databases.

It includes the following topics:

- ◆ About OmniForm Databases
- ◆ Moving Through Records in a Database
- ◆ Creating New Records
- ◆ Duplicating Existing Records
- ◆ Searching Records
- ◆ Sorting Records
- ◆ Recalculating Records
- ◆ Deleting Records
- ◆ Setting Up an OmniForm Database to Be Shared
- ◆ Refreshing Records in a Shared Form
- ◆ Exporting Data
- ◆ Importing Data
- ◆ Protecting Data

About OmniForm Databases

Every OmniForm Form has its own **OmniForm database** associated with it. An OmniForm database is a collection of information stored as individual **records**. Each record uses the same form design, but can contain different information in its fields.

The first time you open a form and fill out information, it becomes the first record in the database. Anyone with access to the form can create new records in it. See page 55 for information on creating records.

This is the fourth record in the database for this form.

Use these buttons to scroll through records in your database.

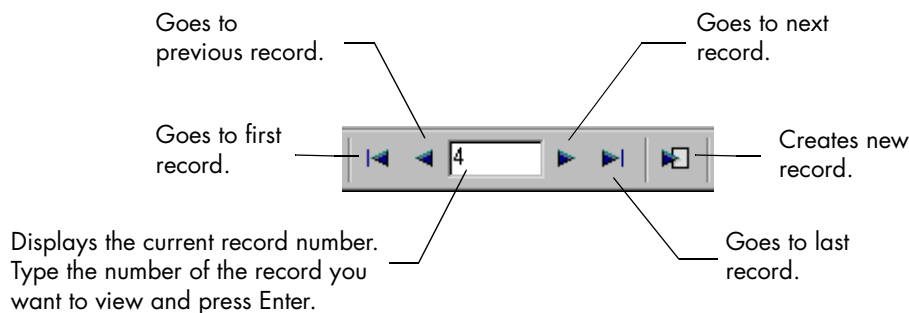
Click the New Record button to create a new blank record to fill out.

The screenshot shows the 'OmniForm Filler' application window with the title bar 'mpgorderformv4.ofm'. The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains various icons, including a 'New Record' button (a document with a plus sign) and navigation buttons (arrows and a search icon). The form itself is titled 'MPG Supplies ORDER FORM' and contains several sections: a customer information section with fields for Name, Company, Street, City, State, and Zip Code; a shipping address section; a section for account information (Account No., Date, Telephone, Order Placed By, E-mail address, Purchase Order No.); a table for items with columns for Item, Quantity, Description, Unit Price, and Total; a section for credit card information (Credit Card No., Expiration Date, Signature); and a section for payment terms (Check information you would like to receive, Tax, and Payment Terms). The 'Records' menu is open, showing a list of records with columns for Record No., Name, and Date. The 'New Record' button is highlighted.

Note You cannot create, duplicate, edit, recalculate, delete, or import information into form records if **data protection** is turned on for the form. See page 70 for more information.

Moving Through Records in a Database

If an OmniForm database has more than one record, you can use the Record buttons in the fill toolbar or the **Go To** commands in the Records menu to move through the database records.



Creating New Records

You cannot create records if data protection is turned on for the form. See page 70 for more information.

▼ To create a new record:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.

You must fill in at least one field in a form before creating a new record, because OmniForm cannot create a new record if the current record is empty. A form with fields filled only by automatic calculations (such as a date field) is still considered empty.



2. Click the **New** button in the fill toolbar or choose **Go To > New** in the Records menu.

OmniForm creates and displays a new, empty record. The record has the same form design as all the other records in the database.

3. Enter the desired information in the record.

OmniForm automatically saves form records as you fill them out. Saving occurs after various actions, such as moving from one record to another, printing or closing a form, and before importing or exporting data.

Duplicating Existing Records

You can duplicate an existing form record to create a new record with the same data. For example, you might do this if you need to enter most of the same information from an existing form record into a new record.

You cannot duplicate records if data protection is turned on for the form. See page 70 for more information.

▼ To duplicate an existing record:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Go to the particular record that you want to duplicate.
3. Choose **Duplicate Record** in the Records menu.

The record is copied and added to the end of the record set.

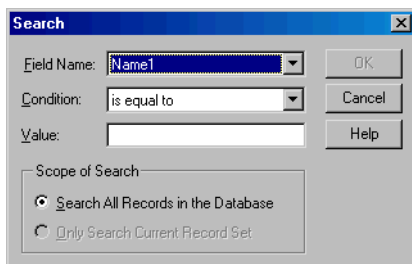
Searching Records

OmniForm can quickly search and retrieve records with the information that you need. These retrieved records are called a **found set**. You can print, mail, or export a found set.

▼ **To search for records:**

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Search...** in the Records menu.

The Search dialog box appears.



3. Select the field that you want to search in the **Field Name** drop-down list.

This is the field that contains the information you want to find. All the fields in your form are listed here.

4. Select a condition in the **Condition** drop-down list.

A condition describes how to look for information entered in the **Value** text box. For example, you would select **is equal to** to specify that you want to find an exact match. Click **Help** for more information on the conditions you can set.

5. Type the information you want to find in the **Value** text box.

Information is not case-sensitive, so entering **Gatos** will have the same result as entering **gatos**.

6. Select an option under **Scope of Search**.

- ◆ Select **Search All Records in the Database** to search the entire record set.
- ◆ Select **Only Search Current Record Set** to search a subset of records. This option is only available when you have a found set open from a previous search.

7. Click **OK** to begin the search.

OmniForm searches and retrieves all records that contain the information you specified in the Search dialog box. The search results are reported directly above the form, and the active record set switches to just the found records.

After a search, the record set switches to just the found records. Use the Record buttons to move through the found set.

Click **Clear Search** to return to the full record set.

Search results appear here. In this case, two records were found.

The screenshot shows the OmniForm application window titled 'OmniForm - [mpgorderformv4.frm]'. The menu bar includes File, Edit, View, Records, Tools, Profiles, Window, and Help. The toolbar contains various icons for file operations and navigation. Below the toolbar, there are buttons for 'Clear Search', 'Last Search: Name1 contains anna', and 'Last Results: Found 2 Record(s)'. The main form area is titled 'MPG Supplies ORDER FORM'. It contains several sections: a customer information section with fields for Name (Anna Oger), Company, Street, City, State, and Zip Code; a shipping address section; a contact information section with fields for Account No., Date, Telephone, Order Placed By, E-mail address, and Purchase Order No.; a table for items with columns for Item, Quantity, Description, Unit Price, and Total; a credit card section with fields for Card No., Expiration Date, and Signature; and a payment terms section with checkboxes for Business Catalog, Home Catalog, E-mail list, Add to list, E-mail address, and Debit from list. There is also a tax section with a table of rates and a shipping and handling charges section with a table of rates. The bottom of the window shows a status bar with 'For Help, press F1' and a currency selector set to 'USD'.

8. Click **Clear Search** above the form to return to the full record set.

Tip

You can narrow the search further by choosing **Search...** in the Records menu again and selecting **Only Search Current Record Set**. You can search each new subset of records as many times as you need to find the specific information you want. OmniForm maintains the current found set if it retrieves no records during a subsequent search.

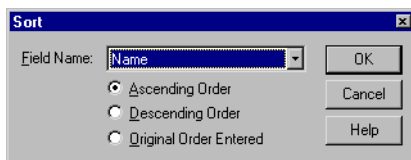
Sorting Records

You can sort records in OmniForm based on the ascending, descending, or original order of specific fields. For example, you could sort invoices by date to find the most delinquent accounts.

▼ To sort records:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Sort...** in the Records menu.

The Sort dialog box appears.



3. Select the field that you want to sort in the **Field Name** drop-down list.

All the fields in your form are in this list.

4. Select the desired sort order:
 - ◆ Select **Ascending Order** to sort records from least to greatest. For example, from A–Z or from 0–100. Symbols precede numbers and numbers precede letters: \$40, 40, Forty.
 - ◆ Select **Descending Order** to sort records from greatest to least. For example, from Z–A or from 100–0. Letters precede numbers and numbers precede symbols: Forty, 40, \$40.
 - ◆ Select **Original Order Entered** after sorting by one of the previous options to return records to the order in which they were originally entered.
5. Click **OK**.

OmniForm sorts the records in the specified order.

Recalculating Records

Recalculating records applies any new or changed calculations to selected records in a database. Until you recalculate records, new or changed calculations apply only to new records. For information on creating calculations in records, see the *OmniForm User's Guide*.

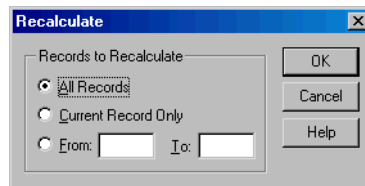
For example, suppose you changed the mileage calculation in an expense form to reflect the latest rate. All new records would use the new calculation and reflect this rate. You would not want older records to use the new calculation because the original rate was correct at the time they were filled. If you recalculated all records after adding the new calculation to the expense form, the mileage rates on your old records would also change. To prevent this, you could search the records for those records that are newer than the date that you changed the mileage calculation, and apply the new calculation only to the newer records.

You cannot recalculate records if data protection is turned on for the form. See page 70 for more information.

▼ To recalculate records:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Recalculate...** in the Records menu.

The Recalculate dialog box appears.



3. Select the records to recalculate.
 - ◆ Select **All Records** to apply the new or changed calculation to either the current found set or to every record in the database if the entire record set is open.
 - ◆ Select **Current Record Only** to apply the new or changed calculation to just the record you are viewing.

- ◆ Select **From/To** and enter a range to apply the new or changed calculation to a range of records. For example, entering 1 in the **From** text box and 5 in the **To** text box would recalculate the first five records in your database or found set.

Note You cannot undo a recalculation.

4. Click **OK**.

OmniForm recalculates the records according to your specifications.

5. Click **OK** to close the dialog box that informs you how many records were recalculated successfully.

Deleting Records

You cannot delete records if data protection is turned on for the form. See page 70 for more information.

Note You cannot undo a record deletion. You might want to export information from a record before deleting it if you want to save its data. See page 63 for instructions.

▼ To delete one or more records:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Go to the record that you want to delete.
3. Choose **Delete Record** in the Records menu to delete just the current record. Or, choose **Delete All Records** in the Records menu to delete every record in the form database.
4. Click **Yes** when you are asked to confirm the deletion.

▼ **To delete a specific set of records:**

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.

2. Click **Search...** in the Records menu to find the specific records to delete.

See page 56 for more information on searching for records.

3. After finding the desired records, choose **Delete All Records** in the Records menu.

This deletion only applies to the found set.

4. Click **Yes** in the confirmation dialog box to permanently delete the found set of records.

Setting Up an OmniForm Database to Be Shared

If you have the full version of OmniForm, you can set up an OmniForm database so that it can be shared by multiple users. This allows anyone who has OmniForm or OmniForm Filler to fill out new records for the form and look through the existing form records simultaneously.

▼ **To set up a shared form:**

1. Open the form in the OmniForm's Form Designer.
2. Choose **Properties** in the File menu to open the Properties dialog box.
3. Select the **Sharing** tab and click **Shared**.
4. Click **OK** to apply the change.
5. Save and close the form, and then open it again.

The shared status does not go into effect until you save and reopen the form.

Refreshing Records in a Shared Form

If you are sharing an OmniForm database with other users, you can refresh records to see if they have been updated by others while you are working on it.

▼ To refresh a record or records:

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Refresh Record** or **Refresh All Records** in the Records menu.

These commands are available only if the form has been set up to be shared. OmniForm checks to see if records have been updated and then displays the latest updates.

Exporting Data

You can export data from OmniForm records to:

- ◆ Share information with other OmniForm databases.

Data exported as a database file takes up considerably less disk space than the database itself. Therefore, it can be copied or mailed more quickly than the entire database.

- ◆ Share information with different databases.

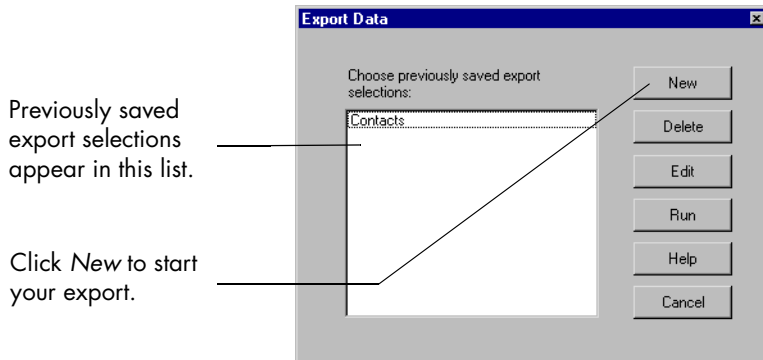
For example, you might have a FoxPro database where you want to enter information from an OmniForm database. Simply export the needed information from OmniForm in the appropriate format and use FoxPro's commands to import it.

Tip

You can also send other OmniForm users an **OmniForm Data file**. This is useful for sharing data when you want to send another user only part of a database. For more information on OmniForm Data files, please see OmniForm's or OmniForm Filler's Help.

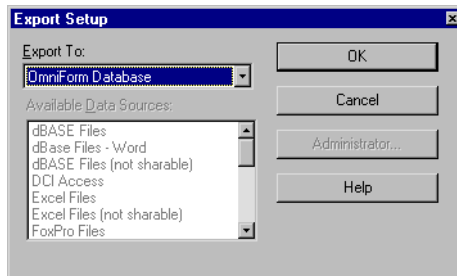
▼ **To export information:**

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Export Data** in the File menu.



3. Click **New** to start the export process.

The Export Setup dialog box appears.

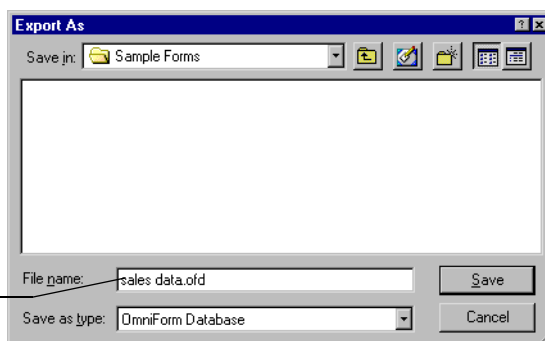


Note Installed ODBC database drivers appear in the **Available Data Sources** list box when you select **ODBC Database** in the **Export To** drop-down list. Depending on your database driver, you can export up to 255 fields at a time. See OmniForm's or OmniForm Filler's Help for more information on exporting data to an ODBC database.

4. Select where you want to export your data in the **Export To** drop-down list and click **OK**.

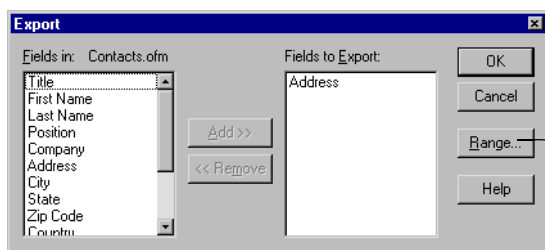
The type of dialog box that appears next depends on the type of database file you selected. For example, the Export As dialog box appears if you selected to export to an **OmniForm Database**.

The default file name uses the currently open OmniForm database. You can change this file name if desired.



5. Enter the desired name for your exported data file and click **Save**.

The Export dialog box appears.



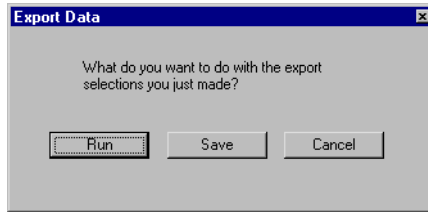
Click *Range* to specify a range of records to export. Otherwise, OmniForm exports all records.

6. Select a field you want to export and click **Add**.

Shift-click to select multiple adjacent records, or hold down the mouse button and drag the cursor over adjacent records. Ctrl-click to select multiple nonadjacent records.

7. Repeat step 6 until you are finished selecting the desired fields. Then click **OK**.

The Export Data dialog box asks you what you want to do next.

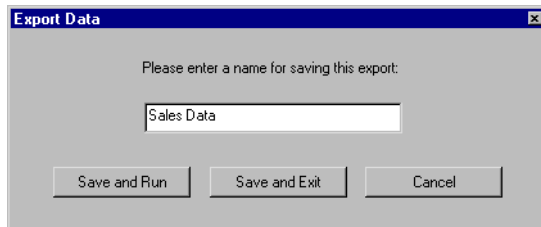


Tip

When you export data from OmniForm, you can save and reuse your export selections for future exports. This will save you time whenever you need to export data from OmniForm. To save your settings during export, click **Save** in step 8 of this procedure.

8. Click **Run** to start exporting the data as specified. Click **Save** if you want to save the export settings for future use.

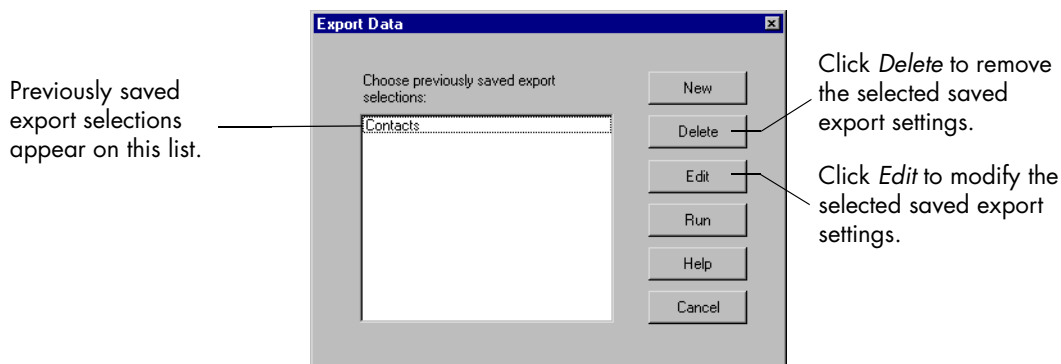
If you clicked **Save**, a dialog box prompts you to enter a name for your saved export selections.



9. Enter a name for your saved selections, and then click **Save and Run** or **Save and Exit** depending on what you want to do.

▼ **To use saved export settings:**

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.
2. Choose **Export Data** in the File menu.



3. Select the name of the export settings file that you want to use.
4. Click **Run**.
The Run Saved Export Information dialog box appears.
5. Click **OK** to start exporting the data as specified.

Importing Data

You can import data into your OmniForm database from these sources:

- ◆ Another OmniForm database
- ◆ An OmniForm Mailable Filler file (either HTML or EXE)
- ◆ Any supported ODBC database source (available sources depend on the installed database drivers)

You cannot import data if data protection is turned on for the form. See page 70 for more information.

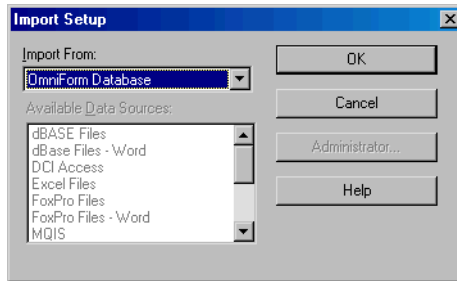
▼ **To import data into an OmniForm database:**

1. Open a form in OmniForm Filler. Or open a form in OmniForm, and click the **Form Filler** tab.

If you are going to import from another OmniForm database, make sure that the OmniForm file is closed.

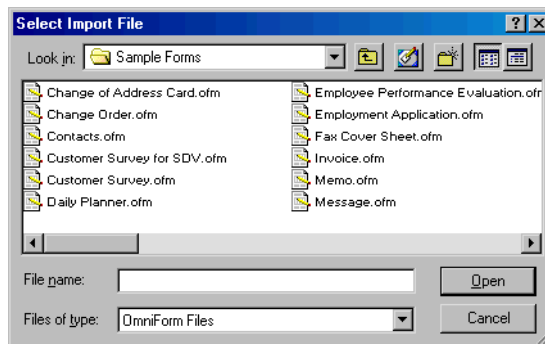
2. Choose **Import Data...** in the File menu.

The Import Setup dialog box appears.



3. Select the type of database information to import in the **Import From** drop-down list.
4. Click **OK**.

The type of dialog box that appears next depends on the type of database file you selected. For example, the Select Import Files dialog box appears if you selected to import from an **OmniForm Database**.



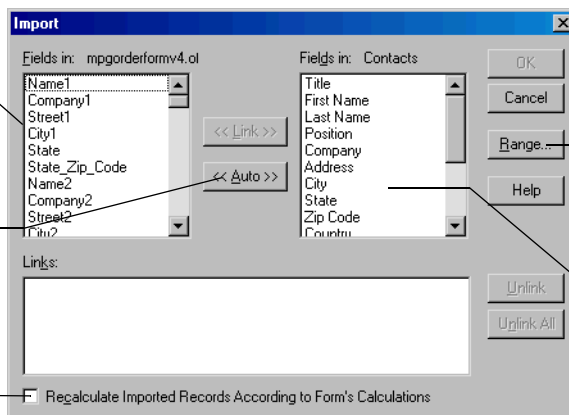
5. Locate and select the OmniForm file you want to import, and click **Open**.

More dialog boxes may appear depending on the database source you selected. Select the appropriate options. For example, the Import dialog box appears after you select an OmniForm file.

Fields in the open OmniForm database appear on the left.

Click *Auto* to automatically link all fields with the same name.

Select this option to apply existing calculations to the imported records.



Click *Range* to specify a range of records to import. Otherwise, OmniForm imports all records.

Fields that you can import from the other database appear on the right.

6. Select a field on the left and a corresponding field on the right, and then click **Link**.

This tells OmniForm which field data to import from the other database and where to import it in the current database.

7. Click **OK** when you are done linking fields.

OmniForm imports the information into the selected fields, creating as many new records as necessary in the process.

Protecting Data

Any change made to a form's design affects all records in its database. For example, if someone deletes a fillable text field, all the information entered for that field in all form records will be deleted. Therefore, you might want to protect a form's design and data from being altered, especially if it is going to be shared by multiple people.

If you have the full version of OmniForm, you can open a form in Form Designer and choose **Protection...** in the Tools menu to turn on settings that protect its design and data. For more information turning on protection, please see the *OmniForm User's Guide*.

Chapter 4



Technical Information

This chapter provides troubleshooting tips and other technical information about using OmniForm Filler. 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
- ◆ OmniForm Filler Compatibility and Limits
- ◆ Uninstalling OmniForm Filler

Troubleshooting

Although OmniForm Filler 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 Filler:

- ◆ Make sure that your system meets all requirements listed in Chapter 1.
- ◆ Visit the support section of ScanSoft's Web site at **www.scansoft.com**. It contains information on using OmniForm Filler and troubleshooting assistance.
- ◆ Restart your computer. Make sure other applications are functioning properly.
- ◆ 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 Windows online Help for more information.
- ◆ Defragment your hard disk. See Windows Help for more information.
- ◆ Uninstall and reinstall OmniForm Filler, as described in the last section, Uninstalling OmniForm Filler.

Low Memory Problems

OmniForm Filler 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 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 Chapter 1 for more information.

Low Disk Space Problems

Problems may 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 Windows Help for instructions.
- ◆ Back up unneeded files onto other media and delete them from your hard disk.
- ◆ Remove Windows applications that you do not use.
- ◆ Defragment your hard disk. See Windows Help for instructions.
- ◆ Clear the cache for your Web browser and limit its size. See your browser documentation for information.

OmniForm Filler Compatibility and 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 Filler can import the following file types for fillable graphic fields:

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

OmniForm Filler Limits

The following are limits in OmniForm Filler.

Forms open at one time: 20

Records in a database: 10,000, or approximately 5.4 MB of data across all records

Uninstalling OmniForm Filler

Sometimes uninstalling and then reinstalling OmniForm Filler will solve a problem.

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

▼ To uninstall or reinstall OmniForm Filler:

1. Close OmniForm Filler.
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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