OmniForm® Reference

Version 2 for Macintosh

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Please Note
To use this program, you should know how to work in the Macintosh environment. Please refer to your Macintosh documentation if you have questions about how to use menu commands, dialog boxes, scroll bars, and so on.

OmniForm Reference
Version 2.01 for Macintosh

Product Serial Number:

_____

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Chapter 1

Introduction

OmniForm is the easy way to convert your paper forms to electronic forms. Use OmniForm to edit, design, and fill forms, manage information databases, and print or fax mail forms among other functions.

This chapter gives an overview of the form creation and information management capabilities OmniForm provides, as well as an explanation of how to use the documentation.

This chapter contains the following sections:

- OmniForm Features
- Using the Documentation

OmniForm Features

OmniForm, an easy-to-use environment for working with forms, is more than just form-recognition software. OmniForm includes the following features:

Form Input

OmniForm uses Logical Form Recognition™ to convert your scanned paper forms or imported image files into electronic, editable forms.

Fill View

Use OmniForm's *Fill View* to fill a form with the information you need. Information entered can easily be searched and sorted.

Design View

Use OmniForm's *Design View* to design your own forms or edit existing forms. A variety of toolbars make formatting easy and convenient. Use the Scrap Album to store or copy form objects.

OmniForm Database

All information you enter into a form is stored as a part of an OmniForm database. You can create, duplicate, sort, and search records, and import and export database information.

Field Validation

You can set up OmniForm to *validate* a fillable field automatically. OmniForm displays a prompt if you enter incorrect information.

Field Calculations

OmniForm's built-in operators and functions let you define calculations that display the correct value as you fill the appropriate field(s) in a form. This automates data entry and reduces the possibility of errors.

Form Printing and Faxing

You can print or fax forms from OmniForm. You have a choice of printing or faxing just the form, just the data entered in a form, or both the form and its information.

Using the Documentation

This section explains the various instructional and formatting conventions used in this manual.

Online Help

OmniForm has both online help and context-sensitive help. Use the commands in the Help menu to find information on OmniForm topics and on using Help itself.

Click the Help button in the OmniForm standard toolbar to turn your cursor into a question mark icon. Click any command, button, or portion of the window to open context-sensitive help for that topic.

Formatting

Two formatting conventions are used throughout the manual.

Italicized Text

- Labeled buttons, menu commands, dialog box text, and any text in an onscreen form are italicized; for example, "Choose *Open* in the File menu."

  Menu titles, icon names, dialog box names, and unlabeled buttons are not italicized.
- A new term may be italicized the first time it is used; for example, "This is a *fill text* field."
- Variable entries are italicized; for example, "The entry *n* must be between 4 and 18."

Courier font

- The Courier font indicates text that you are supposed to enter; for example, "Type `Sample1` in the *File Name* text box and click *OK*."
- The Courier font is also used to distinguish file locations and file and folder names from the rest of the text; for example, "Locate the `Sample` form in the `OmniForm` folder."

Symbols

Two symbols are used in this manual to highlight text.

This symbol means *Note.* It introduces a tip or an item of note.

This symbol means *Warning.* It introduces cautionary text.

Chapter 2

Installation and Setup

This chapter describes how to install OmniForm and begin using it. It contains the following sections:

- System Requirements
- Registering OmniForm
- Installing OmniForm
- Starting OmniForm

System Requirements

To install and run OmniForm, you need the following setup:

- Macintosh 68040 or higher processor, a Power Macintosh, or a Macintosh compatible of either of these versions.
- System 7.1 or higher.
- Free system memory of at least 12MB RAM.
- Minimum of 10MB of free hard disk space.
- CD-ROM drive and internal hard disk.

Additional, but optional requirements include:

- A monitor capable of displaying 256, thousands, or millions of colors.
- If you plan to scan forms, you need a scanner with a Pixel Translations ISIS scanner driver.

Registering OmniForm

Registering your copy of OmniForm entitles you to technical support, notification of special offers and upgrades, and the lowest price offered on the next OmniForm upgrade.

Please complete and send in the registration card included in your OmniForm package.

See “Caere Product Support” on page 10-13 for information on technical support.

Installing OmniForm

This section describes how to install OmniForm.

CD-ROM extensions must be loaded to use the CD-ROM drive.

1. With all extensions off (see the previous paragraph), insert the OmniForm CD in your computer's CD-ROM drive.
2. Double-click to open the CD if it does not open automatically.
3. Double-click the Installer icon.
4. Follow installation instructions.
5. Enter the serial number found on the CD-ROM case when prompted.
6. Restart your computer.

Starting OmniForm

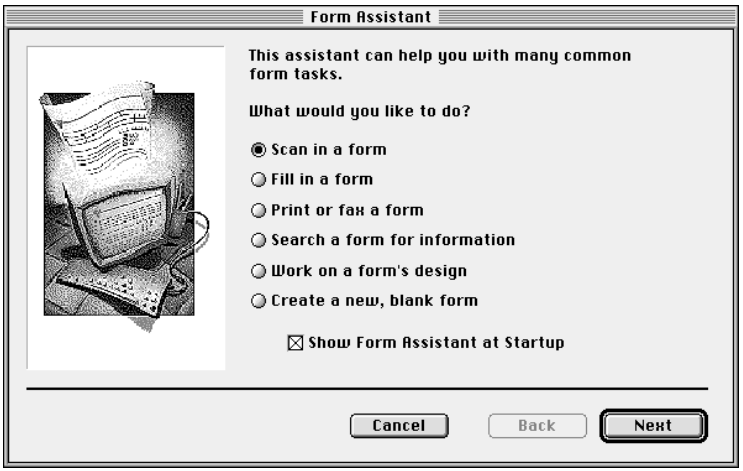
This section describes how to launch OmniForm.

Before you install OmniForm, *please test your scanner* to make sure it is running correctly with your computer system using the manufacturer's scanning utility or imaging software.

To start OmniForm:

1 Double-click the OmniForm icon in the `OmniForm` folder on your hard drive.

Form Assistant appears. It contains six options. Each is a basic OmniForm procedure.



2 Select an option and click *Next>*.

Click *Cancel* to close Form Assistant if you do not want to use Form Assistant and want to go directly to OmniForm.

See Chapter 5, OmniForm Procedures, for detailed information on the basic OmniForm procedures.

Chapter 3

Tutorials

These tutorials guide you through some of the main features of OmniForm. There are four sections in this chapter:

- Tutorial 1 — Load and Fill a Form
- Tutorial 2 — Edit Text and Add a Graphic
- Tutorial 3 — Design Your Own Form
- Tutorial 4 — The OmniForm Database

Perform these exercises in order if you are new to OmniForm. Each new exercise builds upon skills learned in the previous one. Choose the tutorial you want to practice if you already know the basics of scanning, designing, and using forms.

The tutorials cross-reference sections in this manual for additional information on each subject. Read the other chapters in the manual to learn about OmniForm features not discussed here.

Tutorial 1 — Load and Fill a Form

You will load the Sample form in this exercise in one of three ways:

- Scan in the Sample form with a scanner if you have one. The form is supplied inside this manual.
- Fax the Sample form to your computer's fax modem if you have no scanner, use your fax software to save it as a PICT or TIFF file, and open it in OmniForm. The form is inside this manual.
- Locate and open the `Sample` file if you have no scanner and no fax modem. It was placed in your `OmniForm:Sample Forms` folder during installation.

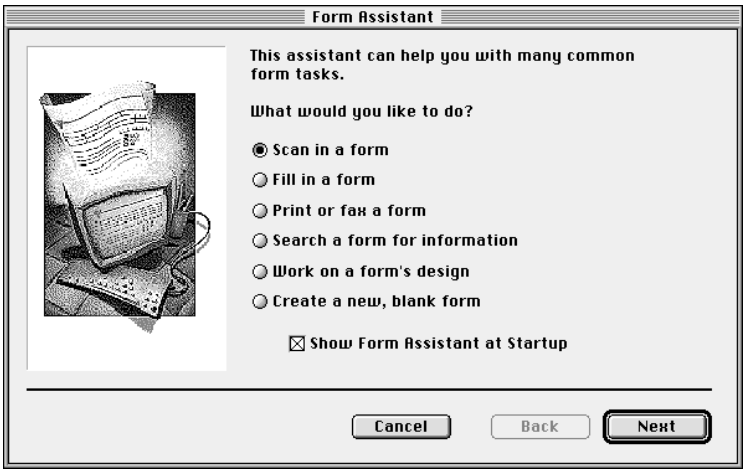
Decide which method you want to use. You can try all three methods eventually if you own both a scanner and a fax modem.

After you have loaded the form into OmniForm, you will practice various features of the program.

Launch OmniForm

Double-click the OmniForm icon in the OmniForm folder.

The Form Assistant dialog box appears.



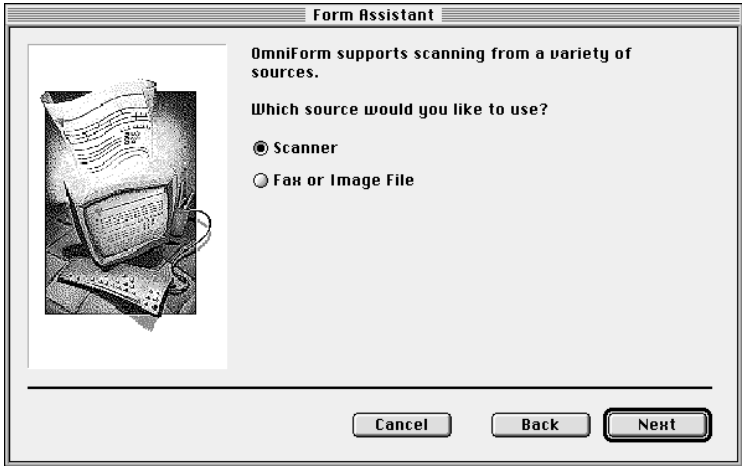
If you accidentally close the Form Assistant dialog box, choose Form Assistant in the File menu to reopen it.

- See the next section if you have a scanner and want to scan the form.
- See "Fax the Sample Form" on page 3-6 if you have a fax machine and a fax modem and want to fax the form to your computer.
- See "Import an Image File" on page 3-6 if you do not have a scanner or a fax modem, or if you want to use this method instead of the other two methods.

Scan the Sample Form

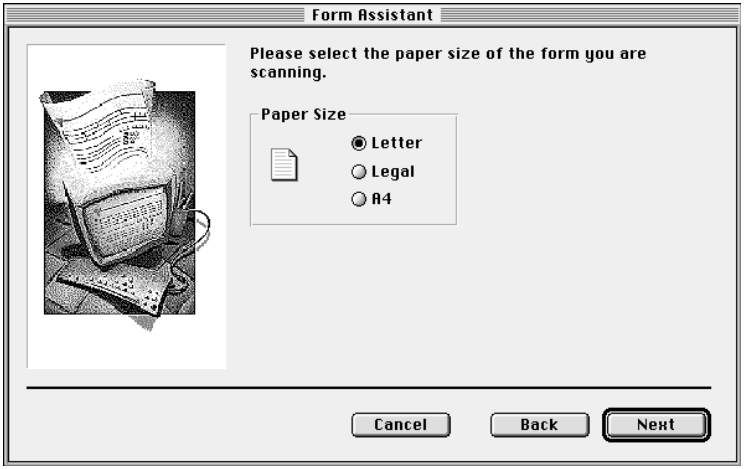
1 Select *Scan in a form* and then click *Next*>.

2 Select a source for the form in the next window.



3 Select *Scanner* and click *Next*>.

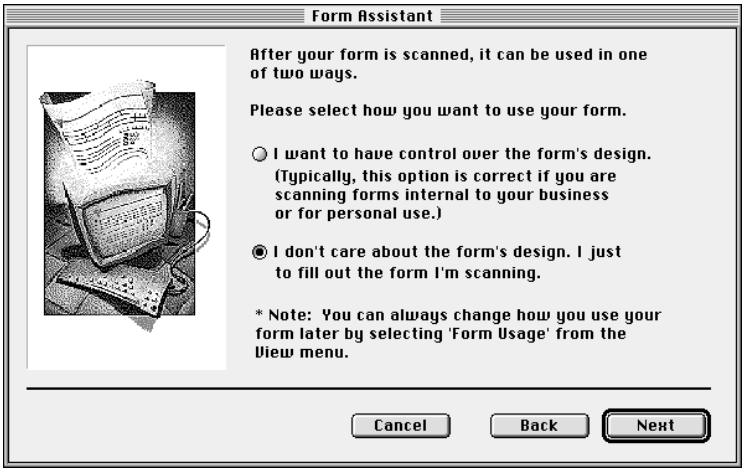
4 Select *Letter* in the next window if this option is not selected.



The Sample form is a letter-sized page.

5 Click *Next*>.
The next window offers two form usage options.

6 Select the second option.

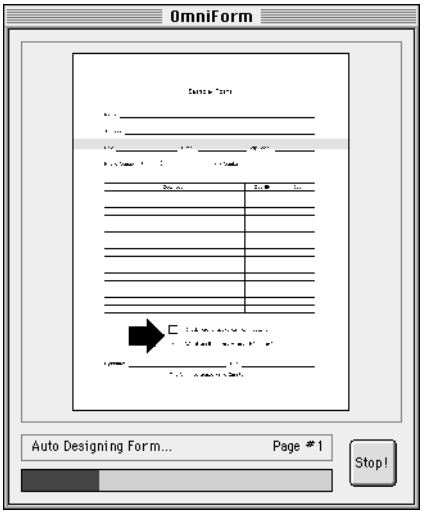


You will just fill the form in this exercise, not work on its design.

7 Click *Next*>.
The next window prompts you to place a page in your scanner.

8 Make sure the page is aligned correctly in your scanner, and click *Finish.*

OmniForm scans the form. The OmniForm window displays scanning, designing, and straightening progress.



The Sample form opens as `Untitled 1` in Fill View. It should look the same as the original copy of the form.

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

The Save As dialog box appears.

10 Type `Sample 1` in the *Save document as* text box and click *Save.*

Proceed to the section “Filling in the Form” on page 3-10 to begin using OmniForm’s tools.

Fax the Sample Form

To fax the Sample form, you need the following:

- a fax modem connected to your computer
- fax software that is compatible with your fax modem
- access to a regular fax machine

To fax the form:

1. Make sure your fax modem is turned on and that your fax software is set up to receive a call.
   Refer to your fax documentation for information.
2. Place the Sample form in the fax machine.
3. Set faxing resolution to *Fine* or *Best*.
   OmniForm may have trouble recognizing documents faxed at a lower resolution. Check your fax machine's manual if you need more information about its settings.
4. Dial your fax modem's number and fax the Sample form as you normally would.
5. Once received, use your fax software to open the Sample form and save it as a PICT or TIFF file.
   Again, refer to your fax software manual if you do not know how to do this.
6. See the next section, "Import an Image File" for instructions on how to convert your fax file into an electronic form in OmniForm.

Import an Image File

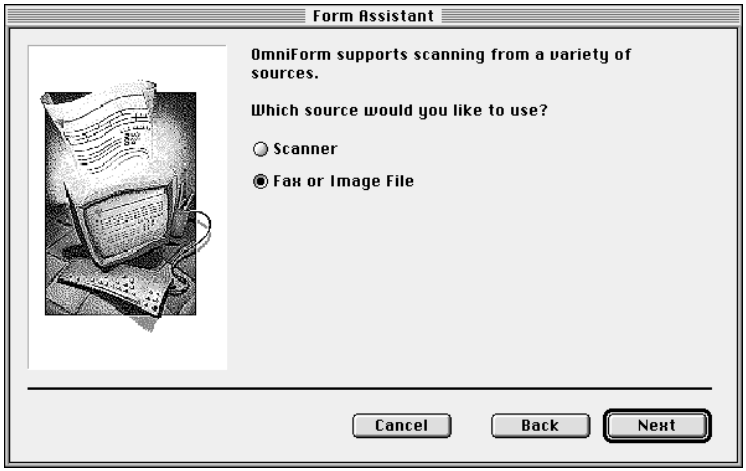
OmniForm can recognize PICT or TIFF image files. An image is an electronic picture of text and/or graphics. This could be a form created in another program or one received as a fax file. See the previous section, "Fax the Sample Form" if you want to create a fax file to import.

You will import an image file in this exercise. You can import a fax file if you have one, or import the `Sample` form that was placed in your `OmniForm:Sample Forms` folder during installation.

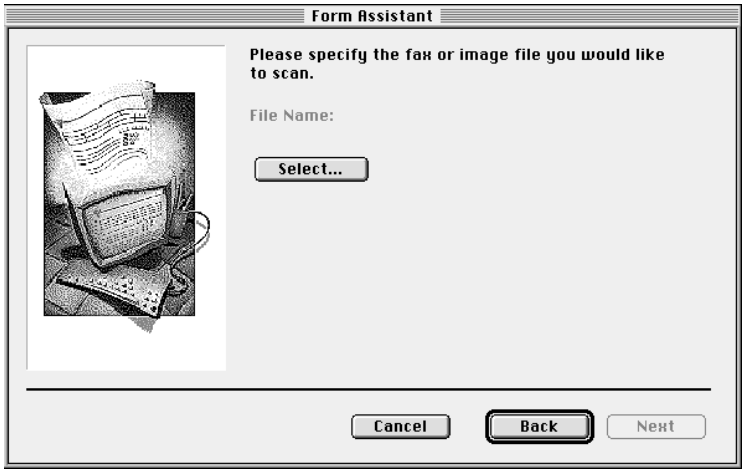
Load the Image File in OmniForm

1 Select *Scan in a form* in Form Assistant and then click *Next*>.

2 Select *Fax or Image* in the next window and then click *Next*>.

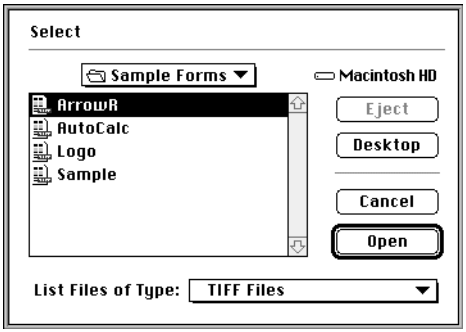


3 Click *Select...* in the next window.



The Select dialog box appears.

- Select *TIFF Files* in the *List Files of type* pop-up menu if you want to import the `Sample` file. Locate and select the `Sample` file in the `OmniForm:Sample Forms` folder.

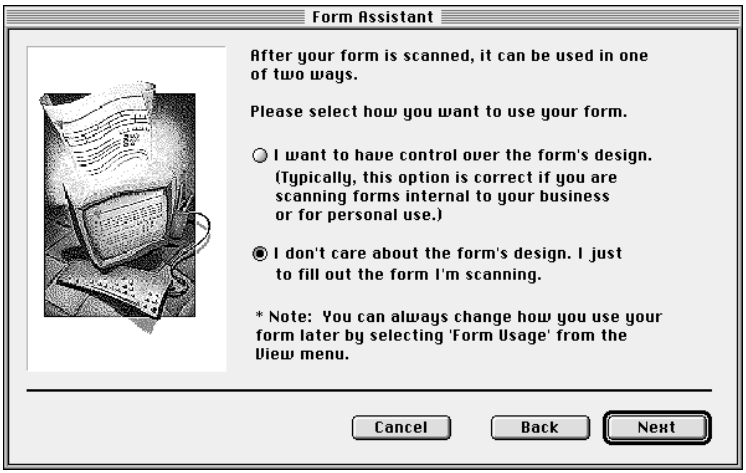


- Locate and select your fax file if you created one in the previous exercise.
- Click *Open* to return to Form Assistant.

The file name appears in the *File* text box.

4 Click *Next>*.
The next window offers two form usage options.

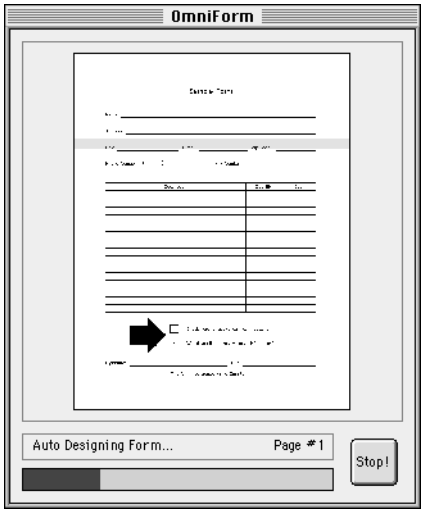
5 Select the second option.



You will just fill the form in this exercise, not work on its design.

6 Click *Finish*>.

The OmniForm window displays scanning, designing, and straightening progress.



The Sample form opens as `Untitled 1` in Fill View.

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

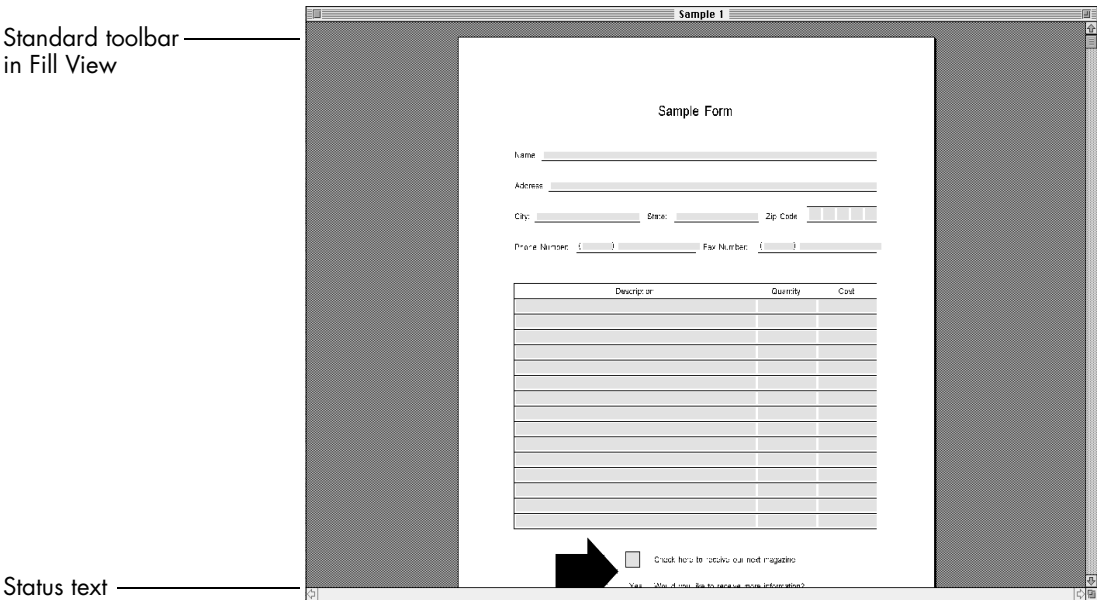
The Save As dialog box appears.

8 Type `Sample 1` in the *Save document as* text box and click *Save.*

The next section shows you how to begin using OmniForm's tools.

Filling in the Form

The `Sample 1` form opens in Fill View.

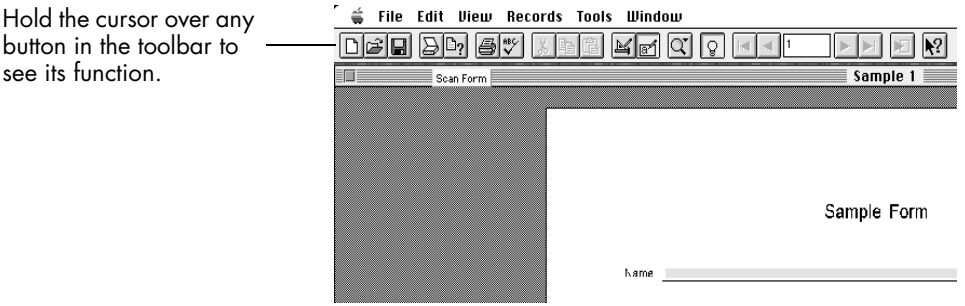


Fill View Overview

The standard toolbar appears below the menus. The buttons correspond to various menu commands.

1 Place your cursor over one of the buttons and hold it there without clicking.

A ToolTip describes the button's function.



Corresponding status text simultaneously appears in the status bar at the bottom of the window.

2 Click the Highlight button in the toolbar or choose *Highlight Fill Areas* in the View menu to turn off field highlighting.

OmniForm highlights all recognized fields in yellow. This makes it easy to see which fields you can fill.

3 Click the button again to turn field highlighting back on.

4 Click the Zoom button and select a page view in the pop-up menu.

Alternatively, choose *Zoom* in the View menu and select a view in the cascading menu.

Fill in the Fields

1 Click the field after *Name* on the form or press the Tab key to place the cursor there.

This is a *fill text* field. The word *Name* on the form is *text*.

2 Type your name in the fill text field.

3 Continue to press the Tab key to move to and fill in the *Address, City,* and *State* fields (or click to place the cursor there).

You can press Shift-Tab to move to a previous field.

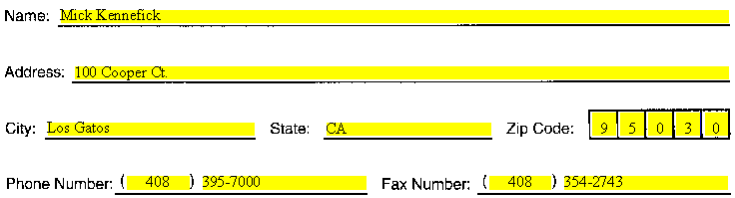
4 Tab to or click in the *Zip Code* field.

This is a *comb* field. This is a field that is subdivided into *comb elements.* The next fields, *Phone Number* and *Fax Number,* are also comb fields.

5 Type five numbers in the *Zip Code* field.

You do not have to click in each box in the field. OmniForm moves the cursor automatically for you.

6 Tab to or click in the *Phone Number* comb field and type a phone number.



7 Fill in the *Fax Number* comb field.

The next item is a *table*. A table contains *cells* and each cell contains a field. The cells in the table are all fill text fields. The headers in the table are text and cannot be changed in Fill View.

- Click in the field under *Description* and type some text.

Description	Quantity	Cost
Elvis Dancing Dinner Set	1	79.99
Snack Food of the Month Around-the-World Gift Basket	2	399

- Press the Tab key to move to the field under *Quantity* and type a number.
- Press the Tab key to move to the field under *Cost* and type another number.

8 Move down the page and click in the square next to the words *Check here to receive our next magazine.*

Check here to receive our next magazine

Yes Would you like to receive more information?

An "X" appears in the box. This is a *check box* field.

9 Click the word *Yes* next to the words *Would you like to receive more information?*

Nothing happens. This should be a *circle text* field but there was no circle on the form to indicate this to OmniForm during form recognition.

OmniForm provides tools to compensate for missing information on forms. The next section describes how to create the circle text field.

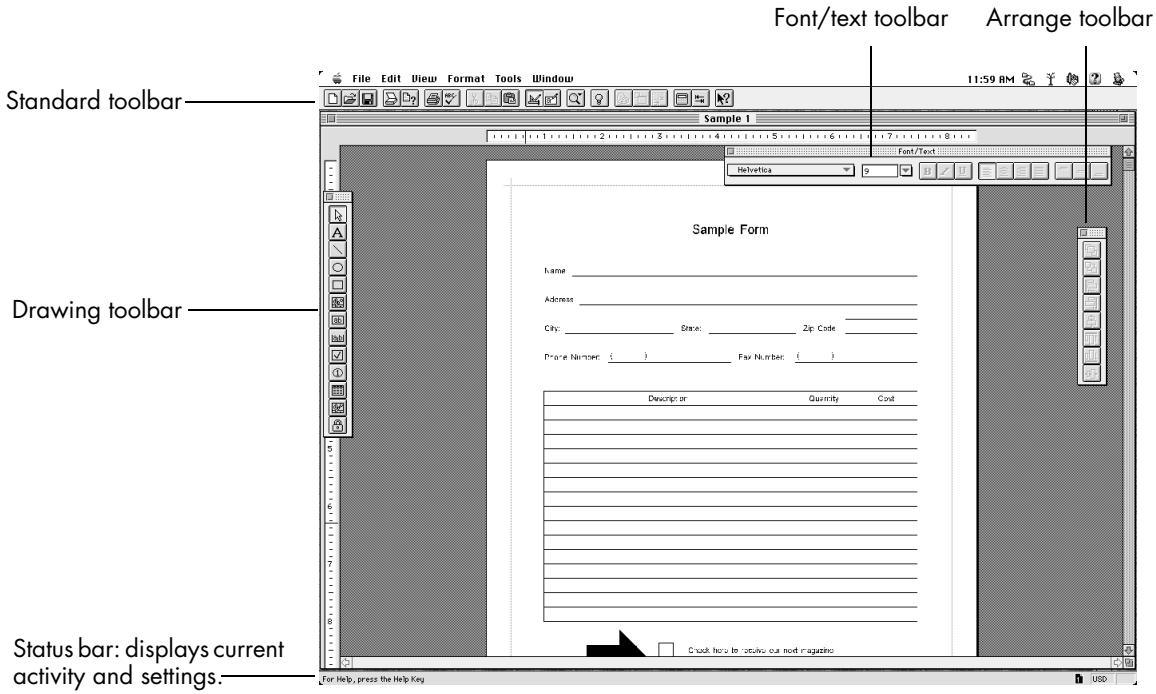
Design View

There are two views in OmniForm: Fill View and Design View. You fill in fields in Fill View. In Design View, you can create and format objects (these become fields in Fill View) and add graphics to a form, among other functions.

Click the Design button in the standard toolbar or choose *Design* in the View menu.

As a handy shortcut, Control-click to open a shortcut menu. Choose *Design* in this menu.

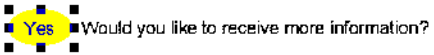
OmniForm switches to Design View. Any text you entered in Fill View disappears in Design View. It still exists in Fill View.



Create a Circle Text Field

1 Click the Circle Text tool in the drawing toolbar.

2 Draw a circle (or oval) around the word *Yes* next to the words *Would you like to receive more information?*



You will select this circle later in Fill View.

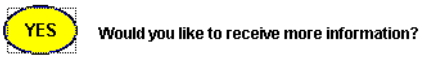
Return to Fill View

1 Click the Fill button in the standard toolbar to return to Fill View.

The text in fill fields is now bold and the number in the table's *Cost* cell is right-aligned.

2 Click the word *Yes* next to the words *Would you like to receive more information?*

This time, a circle appears around the word *Yes.*



You will practice more advanced form editing and design in the next tutorial.

Tutorial 2 — Edit Text and Add a Graphic

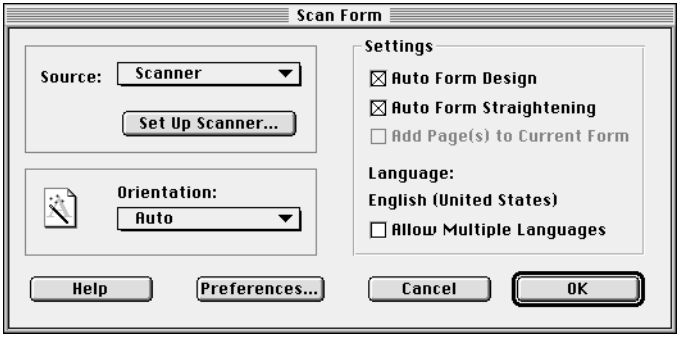
You will scan or import the Sample form into OmniForm again in this exercise. You will verify and correct OCR, and add a graphic to the form.

Scan or Import the Sample Form

See page 3-16 instructions on importing the `Sample` file instead of scanning it.

To scan the form:

1 Click the Scan Form button in the standard toolbar or choose *Scan Form...* in the File menu.
The Scan Form dialog box appears.



2 Select *Scanner* in the *Source* pop-up menu.

3 Select *Auto Form Design* to use Logical Form Recognition to recognize text and fillable fields in the form.

4 Click *OK.*
OmniForm scans the form, recognizes both text and fields, and opens it in Design View.

5 Click the Save button or choose *Save* in the File menu.
The Save As dialog box appears.

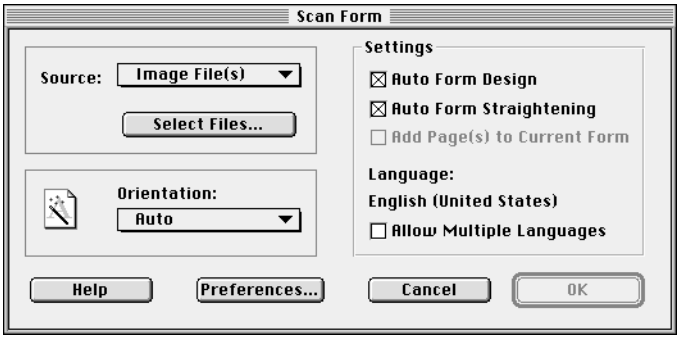
6 Type `Sample 2` in the *Save document as* text box and click *Save.*

Proceed to the section “Verifying OCR” on page 3-17.

To import the form as an image file:

1 Click the Scan Form button in the standard toolbar or choose *Scan Form...* in the File menu.
The Scan Form dialog box appears.

2 Select *Image File(s)* in the *Source* pop-up menu.



3 Click *Select Files...*.

- Locate the `Sample` file in the `OmniForm:Sample Forms` folder.
- Select the file and click *Add>>* to place it in the *Selected Files* list.
- Click *Done* to return to the Scan Form dialog box.

4 Click *OK* in the Scan Form dialog box.

5 OmniForm loads the form, recognizes both text and fields, and opens it in Design View.

6 Click the Save button or choose *Save* in the File menu.
The Save As dialog box appears.

7 Type `Sample 2` in the *Save document as* text box and click *OK*.

The next section explains how to use some of the design tools.

Verifying OCR

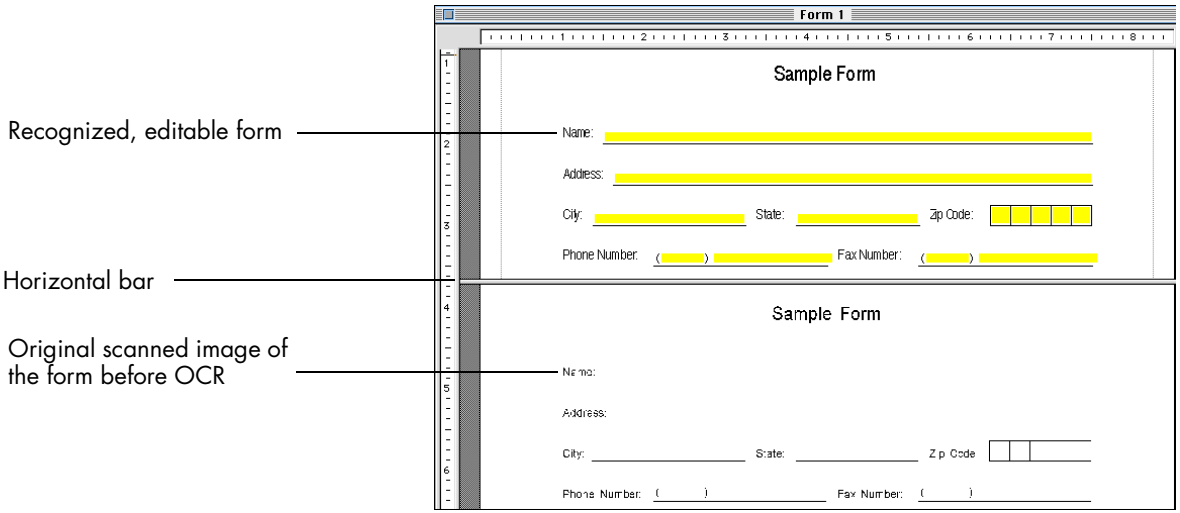
In this exercise, you will verify and correct OCR as necessary and copy a graphic to the new form.

Edit the Text

OCR is not always perfect. Text that is very small, very light or broken, or difficult to read in any other way can cause recognition problems. This is easily corrected in OmniForm.

1 Choose *Form Image* in the View menu.

The screen splits to show the form both as it was designed with OCR and as it was scanned originally.



2 Compare the recognized text in the top view with the original text in the bottom view.

Each view window has its own scroll bar so you can scroll to the same portion of each form. Click a window to make it active. Use the horizontal bar in-between the two windows to resize the view. Your cursor turns into a resize cursor over the bar.

3 Use the Zoom button's pop-up menu to zoom your page view in and out.

4 If you find text in the top window that does not match text in the bottom window:

- Click the Selection tool in the drawing toolbar if it is not selected already.
- Click any text object with erroneous text in the top window to select it.

Your cursor turns into an I-beam when it is positioned over the editable area.

- Use the cursor to select the portion of the text that does not match the original.
- Retype the highlighted portion of the text so that it matches the original.

5 Correct any text as needed this way.

Your text may not need editing, but you can practice selecting and changing text if you like.

6 Click the Save button or choose *Save* in the File menu to save your changes.

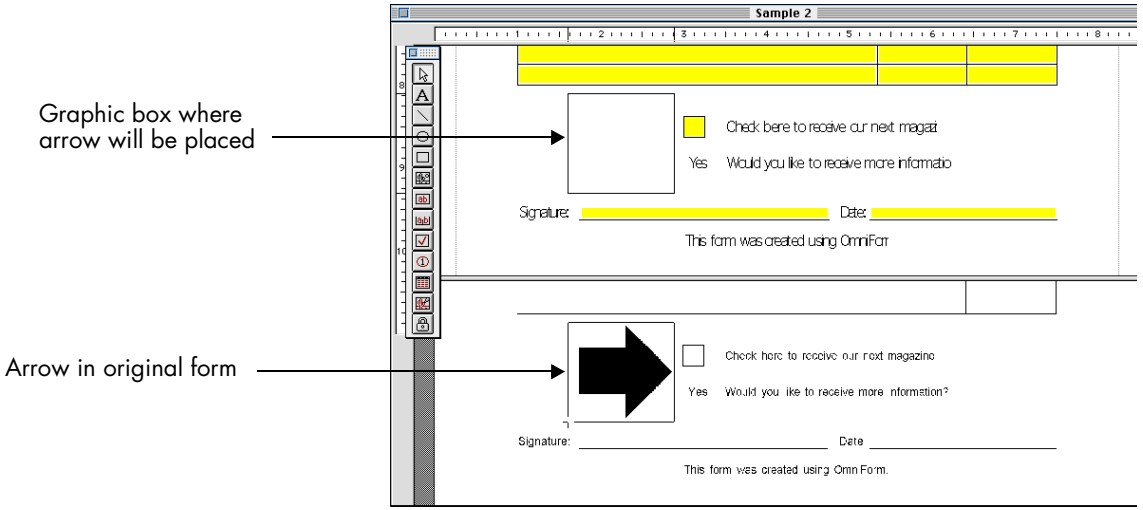
Copy the Arrow Graphic

1 Scroll to the arrow at the bottom of the page in the bottom window and to where it should be in the top window.

Because graphics are not retained during Logical Form Recognition, the arrow does not appear in the top window.

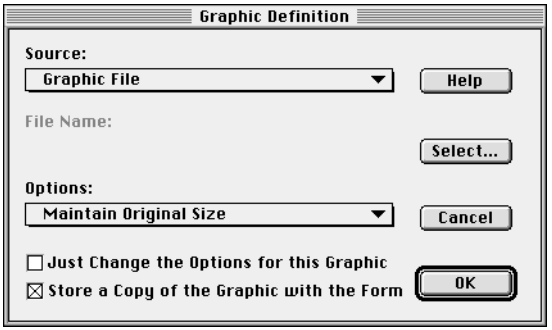
2 Click the Graphic tool in the drawing toolbar.

3 To draw a box around the arrow, draw a box in the top window, using the bottom window as a guide.



4 With the new object still selected, click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

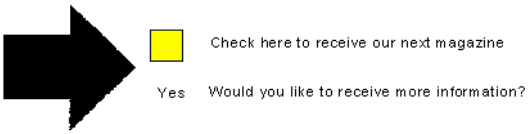
The Graphic Definition dialog box appears.



5 Select *Form Image* in the *Source* pop-up menu.

6 Click *OK*.

The arrow appears in the top window.



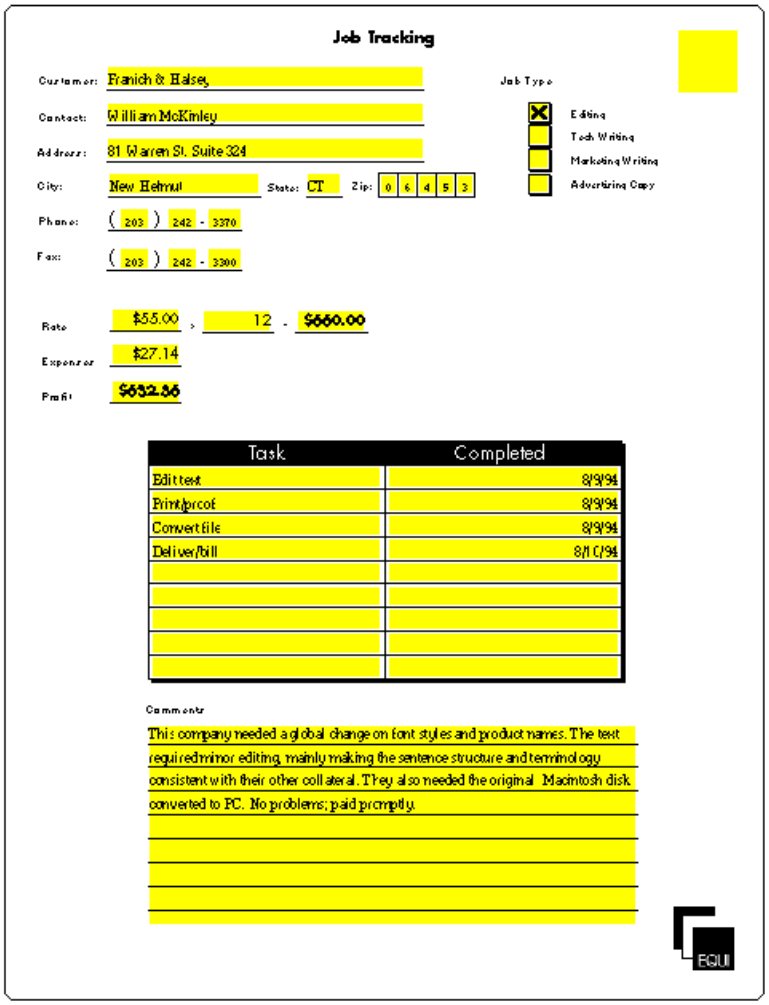
7 Choose *Form Image* in the View menu to close the bottom window.

Alternatively, double-click the horizontal bar or drag it all the way to the top or bottom of the Form window.

You will learn more advanced design techniques by designing your own form in the next tutorial.

Tutorial 3 — Design Your Own Form

The previous two tutorials introduced you to the concepts of loading, filling in, and modifying a form. In this tutorial, you will create the personal job-tracking form shown below for a hypothetical free-lance editor/writer.



See Chapter 6, Designing a Form, for detailed information on form design.

Pre-Organization

It is a good idea to draw a rough draft of a form before you begin to design it, complete with all fields and graphic elements. This makes the design process go faster and you will be less likely to have to go back and redo portions of the form. In this tutorial, the form pictured on the previous page can serve as your rough draft.

You do not have to design the form exactly as it is pictured. Learn the form-design concepts presented here and arrange the form as you please. Use your own graphic files if you have any.

Open a New, Blank Form

1 Launch OmniForm if you closed it after the last tutorial. Click *Cancel* in Form Assistant if it opens.

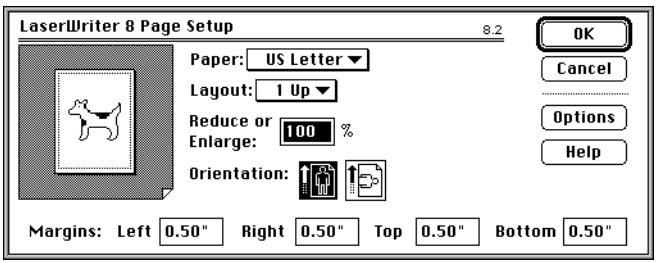
2 Click the New button in the standard toolbar or choose *New* in the File menu.

A blank form appears.

3 Choose *Page Setup...* in the File menu.

The Page Setup dialog box appears.

4 Set page setup options as shown in the picture below and then click *OK*.



5 Click the Zoom button in the standard toolbar or choose *Zoom* in the View menu to select the view size you want.

6 Choose *Save* in the File menu and save your form as an OmniForm Form with the name `Job Tracking`.

7 Make sure the Highlight button in the standard toolbar is selected so that fill objects show up in yellow.

This makes it easier to see size and position while designing.

Create the Text Objects

1 Click the Text tool in the drawing toolbar.

You need text objects named `Customer:`, `Contact:`, `Address:`, `City:`, `State:`, `Zip:`, `Job Type`, `Editing`, `Tech Writing`, `Marketing Writing`, `Advertising Copy`, `Rate:`, `Expenses:`, `Profit:`, and `Comments:`.

2 Create the text objects in one of three ways:

- Click the Lock tool in the drawing toolbar to keep the Text tool selected.

  Draw a text object, type its name while it is still selected, then draw the next one, and so on. Click the Lock tool to deselect it when you are done.

- Draw a text object.

  With the object still selected, choose *Copy* and then *Paste* in the Edit menu. Keep choosing *Paste* until you have created as many text objects as you need. Select each object one at a time and type its name.

- Draw a text object.

  With the object still selected, hold down the Option key and drag to create a copy. Repeat this for each new text object you need. Select each object one at a time and type its name.

3 Line the text objects up approximately where you see them on the form on page 3-21.

Create the Fill Text Objects

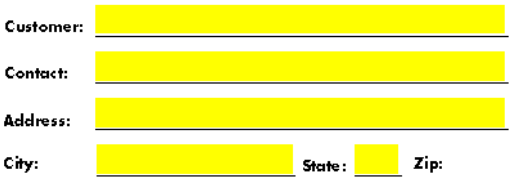
Customer Information

1 Click the Fill Text tool in the drawing toolbar.

2 Draw five fill text objects as described in step 2 in the previous section.

3 Resize the objects as necessary.

4 Line the fill text objects up with the *Customer*, *Contact*, *Address*, *City*, and *State* text objects.

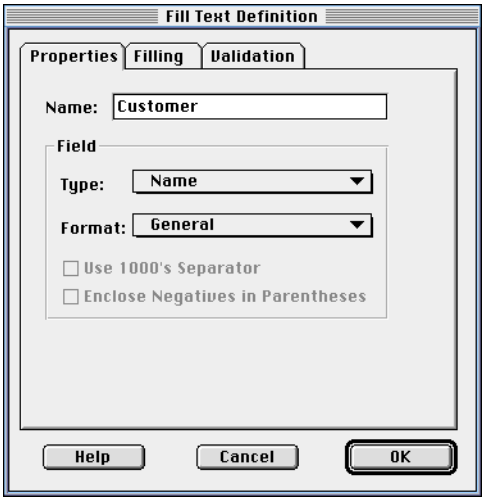


5 Select the Customer fill text object.

6 Click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

The Fill Text Definition dialog box appears.

- Type `Customer` in the *Name* text box.
- Select *Name* in the *Type* pop-up menu.



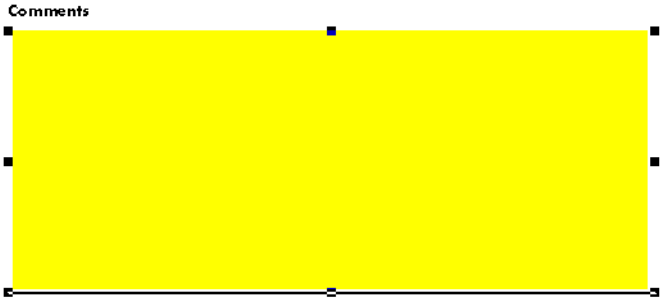
7 Click *OK*.

8 Define the other fill text objects in the same way, choosing the appropriate selection in the *Type* pop-up menu for each. (Select *Name* in the *Type* pop-up menu for the *Contact* fill text object.)

Fill Lines

1 Draw a large fill text object.

2 Drag it beneath the text object *Comments*.



3 With the object still selected, click the Top Alignment button in the font/text toolbar.

4 With the object still selected, click the Left Alignment button in the font/text toolbar.

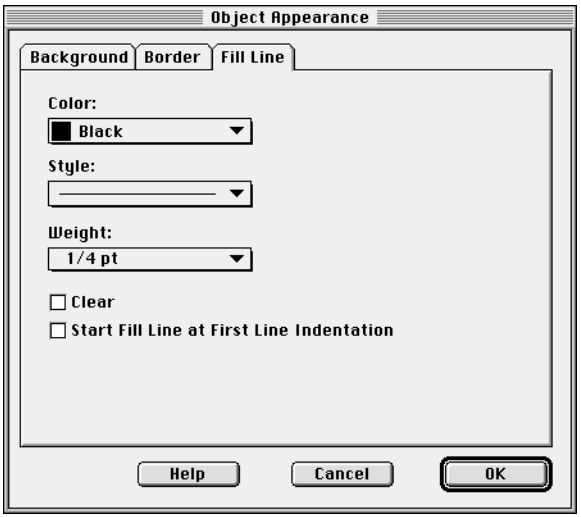
Text entered in Fill View will align to the left and top of the field in Fill View.

5 While the object is still selected, click the Object Appearance button in the standard toolbar or choose *Object Appearance...* in the Format menu.

The Object Appearance dialog box appears.

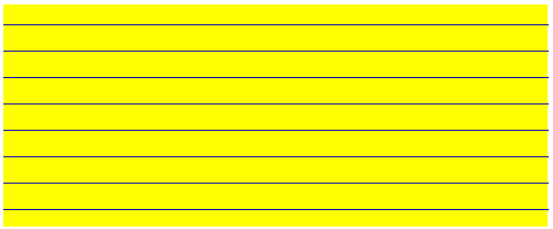
- Click the *Border* tab.
  Click the bottom line in the *Borders* square to delete it.
- Click the *Fill Line* tab.

Select *Black*, a solid line, and *1/4 pt* in the pop-up menus, and deselect *Clear* as pictured below.



6 Click *OK*.

The bottom border disappears from the selected object and fill lines appear to show where lines of text will flow.



7 With the object still selected, click the Object Definition button in the standard toolbar to open the Fill Text Definition dialog box.

- Type `Comments` in the *Name* text box.
- Select *General* in the *Type* pop-up menu (entries in this field could consist of numbers, symbols, and letters).

8 Click *OK*.

Create the Comb Objects

You will draw a simple comb object for the zip code and use the Scrap Album to copy phone and fax numbers.

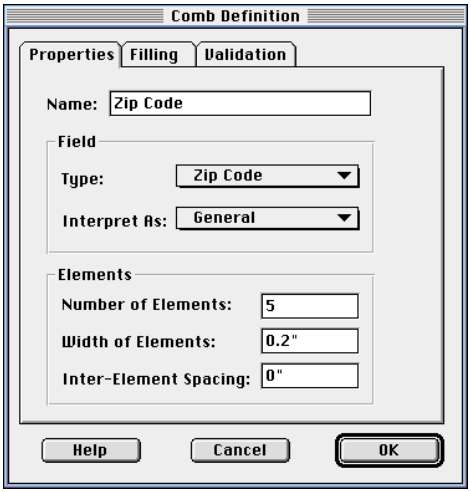
Zip Code Comb Object

1 Click the Comb tool in the drawing toolbar.

2 Draw a comb object.

3 With the object still selected, click the Object Definition button or choose *Object Definition...* in the Format menu.
The Comb Definition dialog box appears.

4 Click the *Properties* tab.
Type `Zip Code` in the *Name* text box.
Select *Zip Code* in the *Type* pop-up menu.
Type `5` in the *Number of Elements* text box.
Type `0.2` in the *Width of Elements* text box.



5 Click *OK*.

6 Drag the Zip comb object next to the *Zip* text object.

Phone and Fax Number Comb Objects

1. Choose *Scrap Album* in the Tools menu.

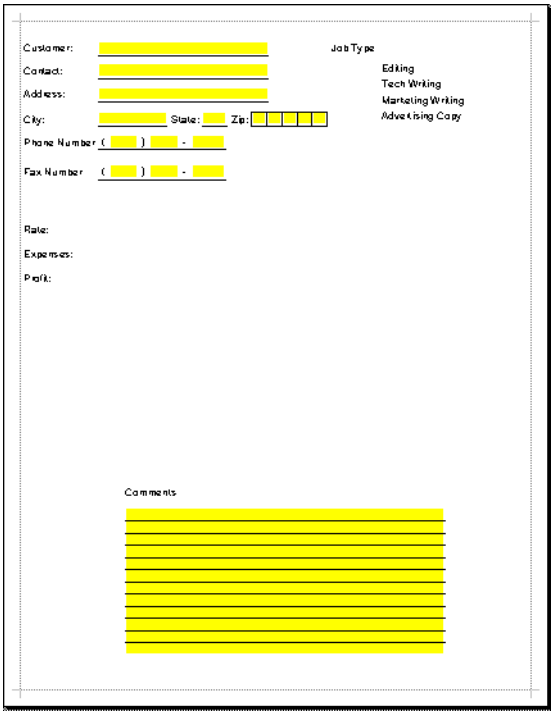
   The Scrap Album opens. It contains *scraps,* copies of OmniForm components/objects. Four Scrap Albums were included in your OmniForm program, each with a different collection of scraps.

2. Select *Special Fields* in the *Scrap Album* pop-up menu.

3. Locate the *Phone Number* scrap in the Scrap Album.
4. Select the scrap and drag it into the form below the *City* objects.
5. Locate the *Fax Number* scrap in the Scrap Album.
6. Select the scrap and drag it into the form below the *Phone* objects.

This exercise illustrates how you can save time by using objects stored in the Scrap Album. See “Using the Scrap Album” on page 6-44 to learn more about creating, storing, and copying scraps and Scrap Album.

Your form-in-progress should look similar to this at this point:



Create the Check Box Objects

1 Click the Check Box tool in the drawing toolbar.

2 Draw a check box.
Hold down the Shift key to constrain the shape to a square.

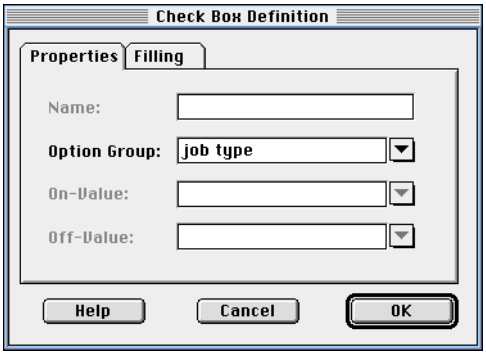
3 With the object still selected, choose *Copy* and then *Paste* in the Edit menu.

4 Choose *Paste* two more times.
You now have four check boxes of equal size.
The user of this form wants to be able to select only one check box at a time so that each copy of the form records just one job. To do so, you must create an *option group.*

5 Shift-click or drag the cursor around all four check box objects to select them.

6 With the objects still selected, click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

The Check Box Definition dialog box appears.



7 Type `job type` in the *Option Group* pop-up menu box.

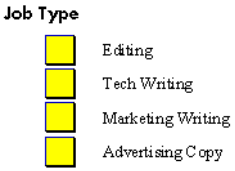
8 Click *OK*.

9 Click *Yes* in the dialog box that asks if you want OmniForm to create unique On-Values for you.

Now you will be able to select only one check box at a time in Fill ViewFill View. See “Defining a Check Box Object” on page 6-24 for detailed information on Option Groups.

You can define each check box individually if you like as well to give it a unique name.

10 Drag the check boxes in front of the *Editing*, *Tech Writing*, *Marketing Writing*, and *Advertising Copy* text objects under *Job Type*.



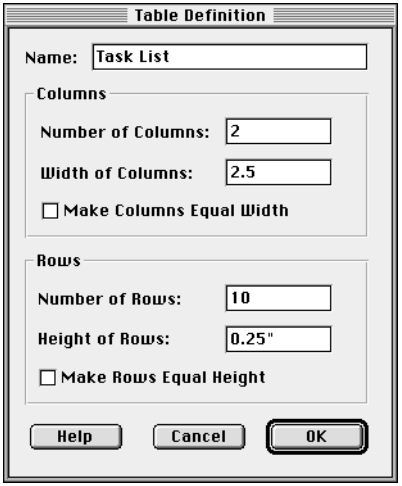
Create the Table Object

Create the Table

1 Click the Table tool in the drawing toolbar.

2 Draw a table.

3 With the table still selected, click the Object Definition button or choose *Object Definition...* in the Format menu.
The Table Definition dialog box appears.



- Type `Task List` in the *Name* text box.
- Type `2` in the *Number of Columns* text box.
- Type `2.5` in the *Width of Columns* text box.
- Type `10` in the *Number of Rows* text box.
- Type `0.25` in the *Height of Rows* text box.

4 Click *OK.*

5 With the table still selected, click the Object Appearance button or choose *Object Appearance...* in the Format menu.
The Object Appearance dialog box appears.

6 Click the *Background* tab and select *Clear.*

7 Click the *Border* tab.
A one-point black border is selected by default. Just for looks, add a shadow effect to the border:

- Select *Lower Right* in the *Location* pop-up menu.

• Select *3 pt* in the *Offset* pop-up menu.

This moves the shadow three points to the right and bottom of the border.

8 Click *OK*.

A shadow appears behind the table.

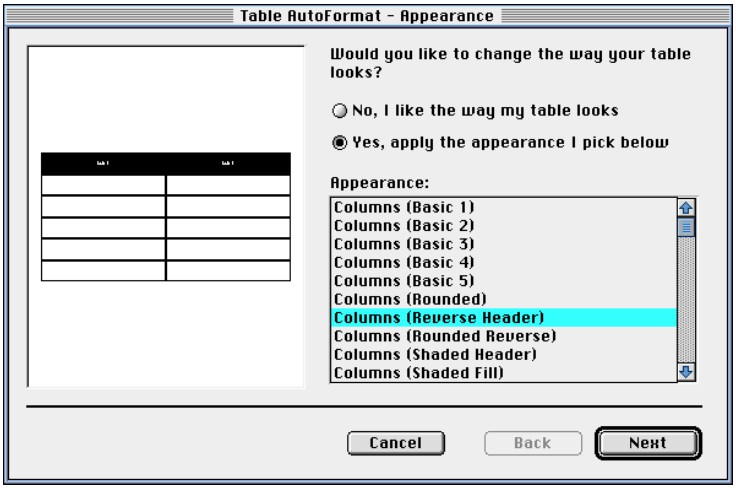
Use Table AutoFormat

1 With the table still selected, choose *Table AutoFormat...* in the Format menu.

The Table AutoFormat dialog box appears.

2 Select the *Yes* option in the window to enable the *Appearance* list box.

3 Select *Columns (Reverse Header)*.



The picture on the left shows how the selected option affects your table.

4 Click *Next>*.

5 Select the *Yes* option in the next window to enable the *Field Names* text box.

6 Select the first word *Label* and click *Rename*.

7 Type `Task`.

All fill text fields within cells in this column are automatically renamed *Task1*, *Task2*, and so forth.

(You can verify this by selecting a cell and opening the Object Definition dialog box.)

8 Repeat for the second word but change its name to `Completed`.

All fill text fields within the cells in this column are automatically renamed *Completed1*, *Completed2*, and so forth.

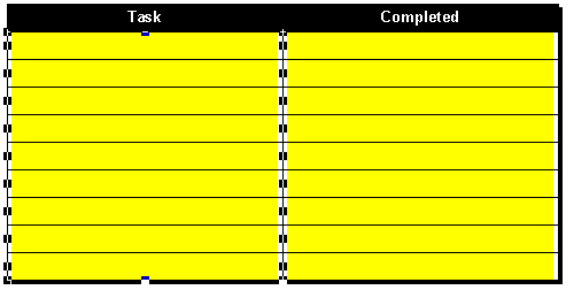
9 Make sure *Change Header to Match Field Names* is selected.

This changes the column names from *Label* to *Task* and *Completed*.

10 Click *Finish*.

Format the Table Cells

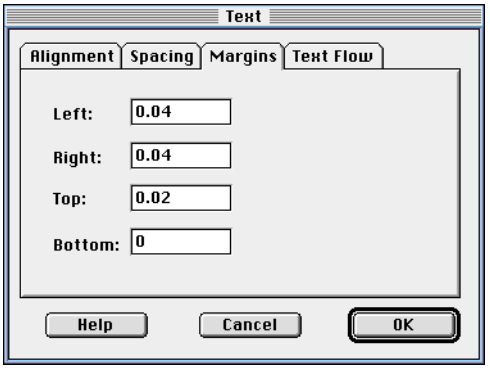
1 Place your cursor outside the left edge of the table, hold down the mouse button and drag your cursor through the nine rows in the left column but not the *Task* row.



Just the nine rows on the left should be selected. Shift-click to select or deselect rows as necessary.

2 Choose *Text...* in the Format menu.

The Text dialog box appears.



- Click the *Margins* tab and type the measurements `0.04, 0.04, 0.02,` and `0` as pictured above.

  This offsets your text from the border around each row, making it easier to read.
- Click the *Alignment* tab and select *Left* and *Bottom.*

  Text entered in Fill View will align to the left and bottom of the cell.

3 Click *OK.*

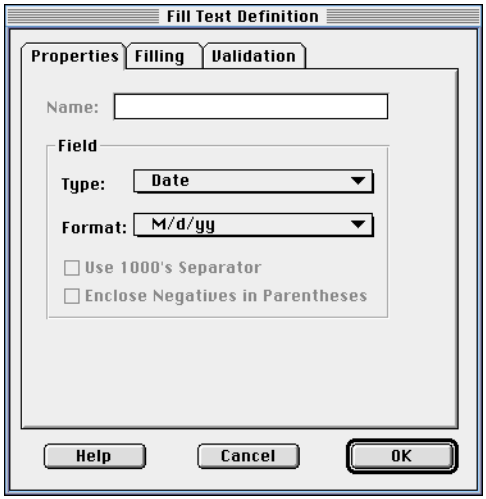
4 Repeat steps 2–3 for the *Completed* column but select *Right* and *Bottom* for the alignment in the Text dialog box.

5 With the right column still selected, click the Object Definition button or choose *Object Definition...* in the Format menu.

The Fill Text Definition dialog box appears.

- Select *Date* in the *Type* pop-up menu.

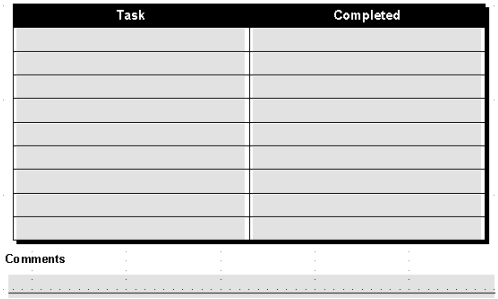
- Select the desired date format in the *Format* pop-up menu.



6 Click *OK*.

Numbers entered in this row will be formatted as right-aligned dates in the format you chose.

7 Drag the table above the *Comments* text object to the middle of the form.



Create the Graphic Objects

You will create both a graphic object and a fill graphic object. You can import a graphic into a graphic object in Design View. You can import a graphic into a fill graphic field in Fill View.

Fill Graphic Object

1 Click the fill graphic tool in the drawing toolbar.
It is the second-to-last button.

2 Draw a box in the upper right corner of the form.
You will import a graphic into this field in Fill View later in the tutorial.

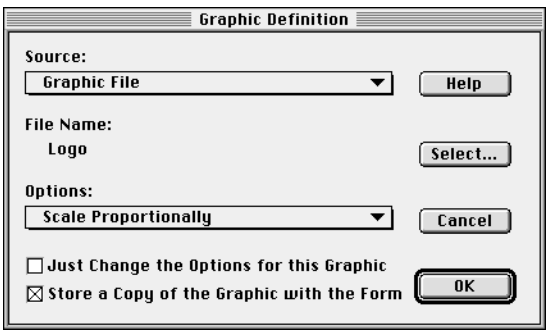
Graphic Object

1 Click the graphic tool in the drawing toolbar.
It is below the Rectangle tool.

2 Draw a box in the lower right corner of the form.

3 With the object still selected, click the Object Definition button or choose *Object Definition...* in the Format menu.
The Graphic Definition dialog box appears.

- Click *Select* to open the Select dialog box.
- Locate the `Logo` file in the `OmniForm:Sample Forms` folder and click *Open.*
- Select *Scale Proportionally* in the *Options* pop-up menu.



4 Click *OK.*
The graphic is imported into the object you drew and scaled to fit in the box while maintaining its original proportions. You could place your own graphic or logo in this object instead.

Define the Calculations

The final objects on this form are fill text objects that have calculations defined on them. In Fill View, these fields become part of a calculation that determines the profit this user makes on each job after expenses. These calculations are very simple but you have the ability to create much more complex ones. See Chapter 9, Using Calculations, for detailed information.

Create and Define the Fill Text Objects

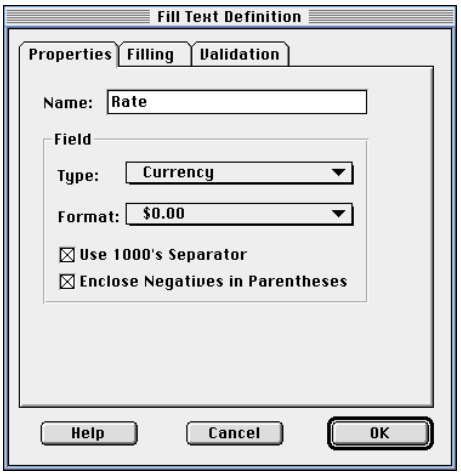
1 Click the Fill Text tool.

2 Draw a fill text object anywhere on the page.

3 With the object still selected, click the Object Definition button or choose *Object Definition...* in the Format menu.

The Fill Text Definition dialog box appears.

- Type `Rate` in the *Name* text box.
- Select *Currency* in the *Type* pop-up menu.
- Select *$0.00* in the *Format* pop-up menu.
- Select *Use 1000's Separator* and *Enclose Negatives in Parentheses.*



4 Click *OK.*

Numbers entered in the *Rate* fill text field will use the currency symbol and number format appropriate to the current form language ($3,000,000 for U.S. English for example). Negative numbers will appear within parentheses: ($3,000,000).

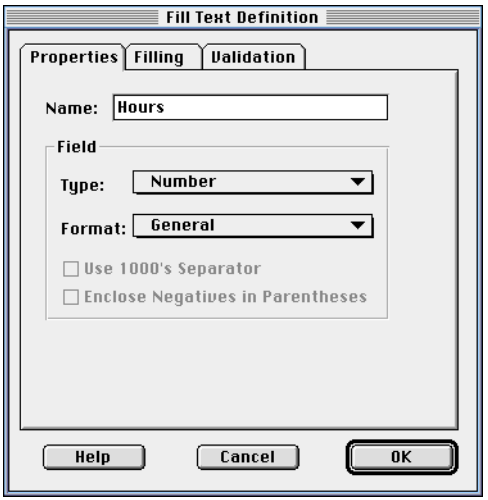
5 With the Rate object still selected, choose *Copy* and then *Paste* in the Edit menu.

6 Choose *Paste* twice more.

7 Use the *Object Definition* command to name the objects: *Earnings*, *Expenses*, and *Profit*.

Because you copied and pasted the objects, the other settings are exactly the same as for the Rate object.

8 Draw another Fill Text object and use the Object Definition command to define it as pictured below:



9 Click *OK*.

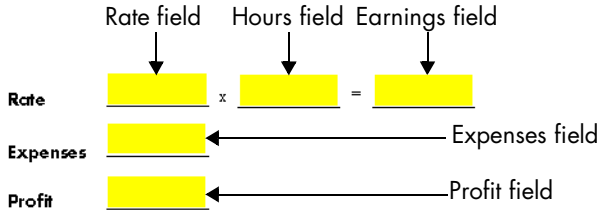
Create the Text Objects

1 Click the Text tool.

2 Draw an object and type an x.

3 Draw another object and type an equal sign(=).

4 Drag the objects so they are lined up approximately as shown:



Set Up Calculations

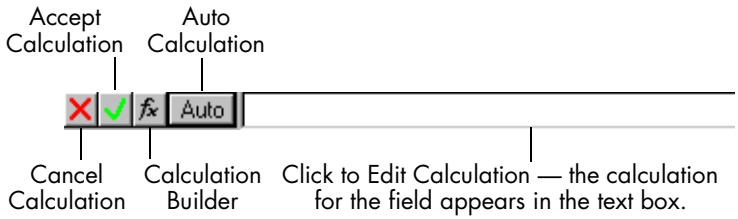
Calculate Earnings

Earnings, on this form, equals the hourly rate (*Rate* field) times the number of hours (*Hours* field) spent on the job.

1 Select the Earnings fill text object.

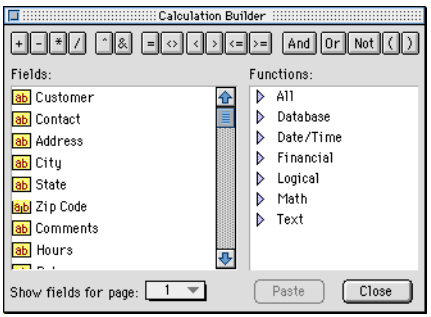
2 Click the Calculation button in the standard toolbar or choose *Calculation...* in the Tools menu.

The calculation toolbar appears at the top of the window below the font/text toolbar.



3 Click the Calculation Builder button in the calculation toolbar.

The Calculation Builder dialog box appears.



4 Locate *Rate* in the *Fields* list box.

5 Double-click *Rate* or select it and click *Paste.*
The field name appears in the calculation toolbar.

6 Click the Multiplication (*****) button in the Calculation Builder dialog box.
It appears after *[Rate]* in the calculation toolbar.

7 Locate and double-click *Hours* in the *Fields* list box.
The calculation in the calculation text box should now read:
`[Rate]*[Hours]`

Click the Cancel Calculation button in the calculation toolbar if you make an error to clear the text box and start again.

8 Click the Accept Calculation button in the calculation toolbar to define the calculation on the Earnings field.
The Calculation Builder dialog box closes.

Calculate Profit

Profit, on this form, equals the Earnings minus Expenses. You will create this calculation manually instead of using the Calculation Builder dialog box so you can see another feature of OmniForm.

1 Select the Profit fill text object.

2 Click in the calculation toolbar's text box to activate the toolbar.

3 Click the Earnings fill text object in the form.
The field name appears in the calculation toolbar.

4 Click in the calculation text box after *[Earnings]* and type a subtraction (`-`) sign.

5 Click the Expenses fill text object in the form.
The calculation in the calculation text box should now read:
`[Earnings]-[Expenses]`

6 Click the Accept Calculation button in the calculation toolbar to define the calculation on the *Profit* field.

7 Click the Calculation button in the standard toolbar or choose *Calculation...* in the Tools menu to close the calculation toolbar.

Customize the Form

Format Objects

As a general rule, forms are easier to read if you use the same font format for all the text objects. Point size and style can be varied according to what you decide looks best and is most logical for the form you create.

On the form shown on page 3-21, all text objects are 9-point Arial bold with the exception of the text objects under *Job Type.* These four objects are entries under a header and it could be confusing if they had the same formatting as the header.

See "Formatting Text" on page 6-35 for detailed information on changing text and font attributes.

Align the Objects

Use the *Align* commands in the Format menu or the Arrange toolbar to line up selected objects left, right, center, and so forth.

Use the *Snap to Grid* command in the Tools menu to line fields up precisely along a grid. Choose *Grid Settings...* in the Tools menu to set the size of the grid. Turn this command off if you do not want fields snapping to a grid.

Selecting Objects

There are several ways to select multiple objects.

- The *Select Special...* command in the Edit menu lets you select all objects of a certain type at the same time. This way, you can apply the same formatting to all selected objects instead of one by one.
- Shift-click to select multiple objects.
- Hold down the mouse button and drag the cursor around all objects to select.

  An object only has to be touching the selection area to be selected. Remember to fully enclose table and comb objects unless you want individual elements and cells selected.

Use the Drawing Tools

You can use the Line, Oval, and Rectangle tools in the drawing toolbar to customize your form.

To draw the rounded border around the outside of the form:

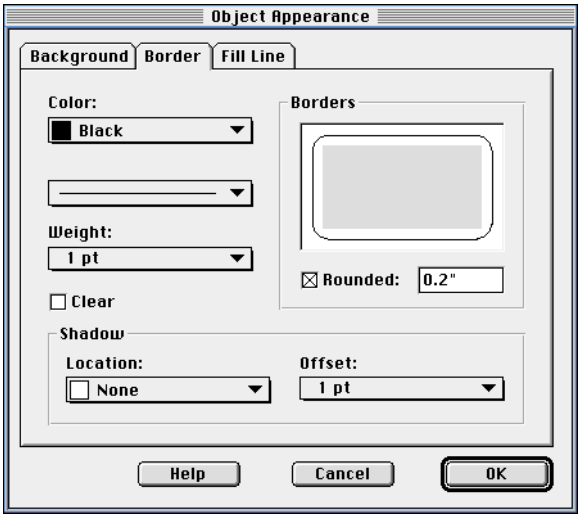
1 Click the Rectangle tool.

2 Draw a border around the outside edge of the form.

3 With the border still selected, click the Object Appearance button or choose *Object Appearance...* in the Format menu.

The Object Appearance dialog box appears.

- Click the *Background* tab and select *Clear.*
- Click the *Border* tab and select the settings shown below.



4 Click *OK.*

See page 3-21 again for the completed form. Your final form should look similar to this depending on how you chose to customize it. Your form will not as yet have the arrow in the upper right corner. That is added in Fill View.

Tab Order

You can tab from field to field in Fill View. This is faster than moving the cursor to each field. When tabbing, OmniForm moves the cursor through the fields in the order in which they were created. This may not be the order you want.

To change tab order:

1 Click the Tab Order button in the standard toolbar or choose *Tab Order...* in the Tools menu.

The Tab Order window appears, and numbers appear by each field on the form.

Both indicate current tab order.

In the example above, the user wants the check box fields to be before the *Rate* field because that is the order of the fields on the form. Your Tab Order dialog box will not necessarily look the same as this one.

2 Select the field to reorder.

Note that the corresponding field on the form highlights.

3 Reorder the field in one of the following ways:

- Drag the field up or down in the dialog box to reorder it.
- Click the *Move Up* button to move the field up. Click as many times as needed to move it into place.
- Click the *Move Down* button to move the field down. Click as many times as needed to move it into place.

- Click *Auto Order* to have OmniForm order the fields for you.

The tab order numbers on the form change correspondingly when you reorder a field in the Tab Order dialog box.

4 Repeat for each field you want to reorder.

5 Click the Tab Order button in the standard toolbar or choose *Tab Order...* in the Tools menu to close the Tab Order window.

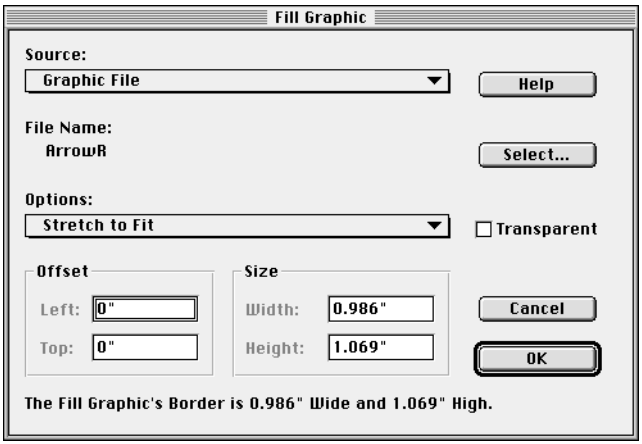
Test the Form in Fill View

1 Click the Fill button or choose *Fill* in the View menu.

2 Click the fill graphic field in the upper right corner of the form.

The Fill Graphic dialog box appears.

- Select *Graphic File* in the *Source* pop-up menu.
- Click *Select* to open the Select dialog box.
- Locate the `ArrowR` file in the `OmniForm:Sample Forms` folder.
- Click *Open* to return to the Fill Graphic dialog box.



- Select *Stretch to Fit* in the *Options* pop-up menu.

3 Click *OK.*

The graphic is imported into the field you drew and stretched to fill the entire box. Click in the field again if you want to change the graphic's appearance or import a new graphic.

4 Tab from field to field to test tab order.

5 Enter text in the fill text fields to see your formatting and to make sure the fields are large enough for text entered.

6 Select a check box under *Job Type.*

7 Click another check box to deselect the first.

8 Enter text in the table cells.

- Verify that text is not flush against a border, making it hard to read.
- Verify that text in the left column is left-aligned and text in the right column is right-aligned.
- Enter dates in the right column in any format and note that they are converted to the format you chose when you defined the fields. The conversion takes place after you move the cursor from the field.

9 Verify that comb field elements contain the right amount of numbers.

10 Enter numbers in the calculation fields.

The Expenses and Profit fields should fill automatically and correctly as you fill in the other fields involved in the calculation.

Return to Design View to make any changes you need. Save this form. You will use it in the next tutorial.

Tutorial 4 — The OmniForm Database

This tutorial is a brief introduction to the OmniForm database. A 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. OmniForm automatically creates a database when you scan in or import a form.

In the previous tutorial, for example, you created the `Job Tracking` form. As soon as you fill in the form, it becomes the first record in the new database. The user of this database creates a new record for each job completed, making it possible to store and find a large amount of similar information.

See Chapter 8, Managing an OmniForm Database, for detailed information, including working with records and importing and exporting databases.

This tutorial shows you how to create new records, search for specific information in a database, sort records, and delete records. You will use the job-tracking form you created in the last tutorial.

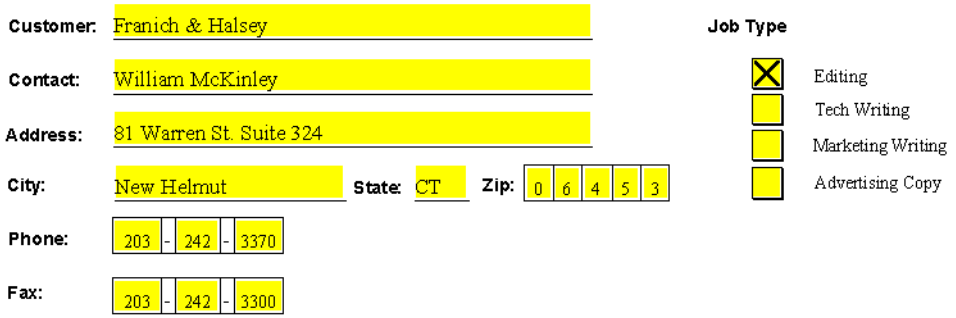
Duplicating a Database Record

The hypothetical user of this job-tracking database uses the same form design to enter different information in new records. You can add a new, empty record to this database and fill in the form each time, or you can duplicate an existing record that has similar information when you need to add a new record. This way you do not have to fill in the whole record — just change one or more fields.

To duplicate a record:

1 Locate and open the `Job Tracking` form you created in the previous tutorial.

2 Enter the customer information shown below.



Suppose you did another job for this company but this time instead of editing it was marketing writing. You do not have to retype all the same information for just one change.

3 Choose *Duplicate Record* in the Records menu.

4 Click *OK* in the dialog box that informs you that a record has been added to the set.

Another record for Franich & Halsey is added to the set and OmniForm moves to the new record.

5 Select the *Marketing Writing* check box.

The *Editing* check box is deselected.

Creating New Records

Suppose after this job you complete two more jobs and need to add two more records to the database.

To create new records:

1 Click the New Record button or choose *Go To* in the Records menu and *New* in its cascading menu.

OmniForm creates a new, empty record.

2 Type `The Borne Corporation` in the Customer fill text field.

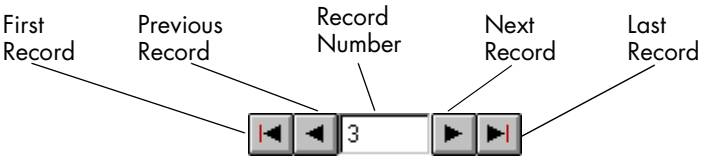
Fill in other information if you like.

3 Click the New Record button again.

4 Type `Zimmer DTP` in the Customer fill text field in the new record.

Fill in other information if you like.

5 Use the Record buttons in the toolbar to scroll through your records.



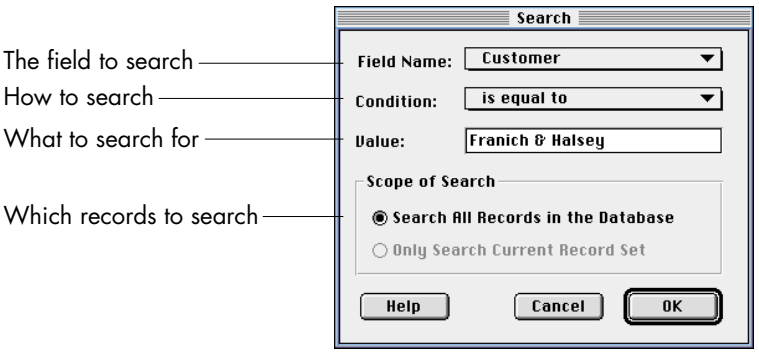
Search the Database Records

It is not hard to find information when you only have a few records, but depending on your database, you may have thousands. OmniForm makes it easy to find the information you need quickly.

To search records:

1 Choose *Search...* in the Records menu.

The Search dialog box appears.



- Select *Customer* in the *Field Name* pop-up menu.
- Select *is equal to* in the *Condition* pop-up menu.
- Type `Franich & Halsey` in the *Value* text box.

This dialog box illustrates why it is important to give fields a unique name after you create them. If you had not named the *Customer* field, it would appear simply as *FillTextn* (where `n` is a number) making it difficult to decide what to choose.

2 Click *OK.*

3 OmniForm searches the database and retrieves the two records that match the search criteria. This is called the *found set.*

Status text just below the toolbar shows the search results information.

You can narrow a search further by searching a found set for more specific information. For example, you might want to find only editing jobs you had done for Franich & Halsey. You would enter the appropriate information in the Search dialog box and select *Only Search Current Record Set.* This is useful when you have a large found set.

4 Click the *Clear Search* button below the toolbar to return to the full database set.

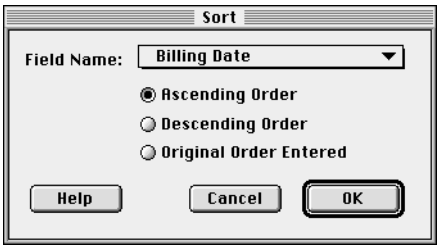
Sort the Database Records

You may need to sort your database records in some logical order, for example, alphabetically by customer name as you will in this exercise.

To sort records:

1 Choose *Sort...* in the Records menu.

The Sort dialog box appears.



- Select *Customer* in the *Field Name* pop-up menu.
- Select *Ascending Order* (A-Z; descending order would be Z-A).

2 Click *OK.*

OmniForm examines the Customer field in each record and sorts the records alphabetically: the two Franich & Halsey records are numbers *1* and *2*, The Borne Corporation is number *3*, and Zimmer DTP is number *4.*

3 Click *OK* in the dialog box that tells you how many records were sorted.

You could also sort a subset of retrieved search records. You might, for example, find all a certain customer's records and then sort those records by date or any other way you choose.

Database Changes

You have changed individual records in Fill View in this tutorial. Changes to one record did not affect changes to another record. However, changes in Design View do affect your records.

To make a change in Design View:

1 Click the Design button or choose *Design* in the View menu.

2 Delete the graphic object in the lower right corner.

3 Click the Fill button or choose *Fill* in the View menu.

4 Click the appropriate Records button to view each record. The logo is now missing from every record.

Any change made in Design View affects *all* the records in that particular database. This is important to remember, especially if you have more than one user of your database.

You can protect your database from unauthorized changes in several ways:

- In Design View, choose *Protection...* in the Tools menu to open the Protection dialog box.

  Select *Protect Data* to make all information read-only. No changes can be made in Fill View to any of the records. This also prevents users from duplicating or deleting records.

  Select *Protect Form* if you do not want anyone to be able to change a form in Design View. Remember, deleting a fill field in Design View also deletes *all* the information that was entered in that field in Fill View.

- Have other users use the program OmniForm Filler to open the database. This is a version of OmniForm that has only a Fill View. Users cannot change the form's design.

Deleting Records

You may want to delete an old or obsolete record.

To delete a record:

1. Return to Fill view if you are not in it already.
2. Choose *Delete Record* in the Records menu.
3. Click *Yes* in the warning dialog box that appears.
   The record you are viewing is deleted permanently from the database.

Use the command *Delete All Records* to permanently destroy all database records. You can also use the command to delete a subset of retrieved search records.

Suppose, for example, you have 14 entries for PatEl Corporation in your customer update database. Then they go out of business and you decide you no longer need the information because it just takes up disk space.

You would search for *PatEl Corporation* in the relevant field, and then choose *Delete All Records* in the Records menu. All PatEl Corporation entries would be permanently deleted but the other records would be safe.

You cannot undo the *Delete Record* command!

Chapter 4

Views and Form Usage

This chapter describes basic OmniForm concepts you should know before scanning, importing, or designing a new form.

It contains the following sections:

- Using Form Assistant
- The Design View Window
- The Fill View Window
- Form Usage Options

Proceed to Chapter 5, OmniForm Procedures, if you want to begin working with forms immediately.

Using Form Assistant

This section describes Form Assistant and its basic OmniForm functions.

Form Assistant is a dialog box that appears the first time you launch OmniForm. Form Assistant makes decision-making easy when processing a form.

This section contains the following topics:

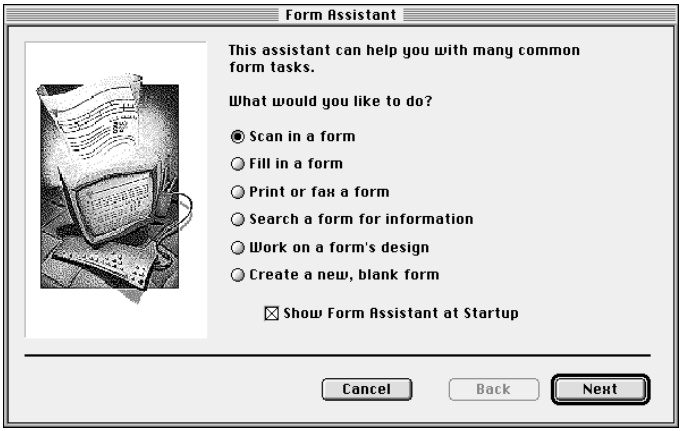
- Opening Form Assistant
- The Form Assistant Options
- Setting the Form Assistant Startup Option

Opening Form Assistant

There are several ways to open Form Assistant.

- Form Assistant opens automatically the first time you launch OmniForm.
- Click the Form Assistant button in the standard toolbar at the top of the window if OmniForm is open.
- Choose *Form Assistant...* in the File menu if OmniForm is open.

Form Assistant contains six options for basic OmniForm procedures as described in the next section.



The Form Assistant Options

This section gives a brief description of each option in Form Assistant. A cross-reference after each description points you to step-by-step instructions for the procedure.

Scan in a form

Select *Scan in a form* to scan a paper form or import an image file and to determine how you will work with the form in OmniForm. See "Scanning a Paper Form" on page 5-2 or "Importing an Image File" on page 5-8 for instructions.

Fill in a form

Select *Fill in a form* to fill the currently open form or to open a form and fill it. See "Filling a Form" on page 5-13 for instructions.

Print or fax a form

Select *Print or fax a form* to print or fax the currently open form or to open a form and print or fax it. See "Printing or Faxing a Form" on page 5-14 for instructions.

Search a form for information

Select *Search a form for information* to search the currently open form for information or to open a form and search it. See "Searching a Form" on page 5-17 for instructions.

Work on a form's design

Select *Work on a form's design* to redesign the currently open form or to open a form in Design View. See "Opening a Form to Design" on page 5-19 for instructions.

Create a new, blank form

Select *Create a new, blank form* to open a blank page in Design View. See "Creating a New Form" on page 5-20 for instructions.

Show Form Assistant at Startup

- Select the *Show Form Assistant at Startup* option if you want Form Assistant to appear at startup.

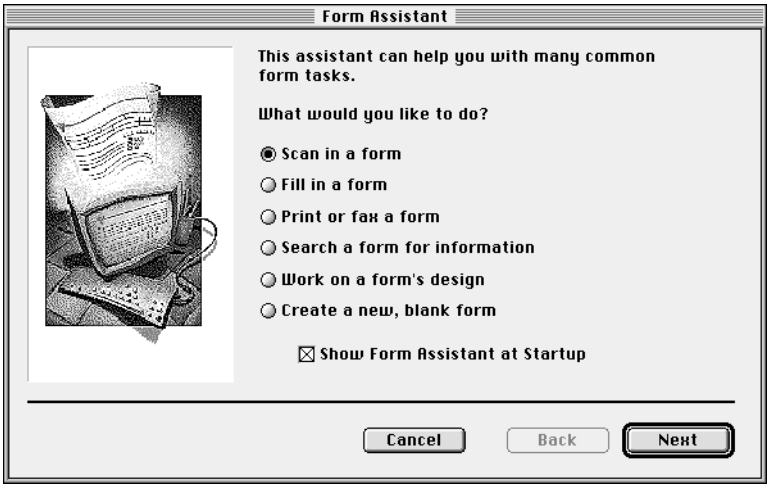
Setting the Form Assistant Startup Option

You can enable or disable Form Assistant at startup. To do so:

1. Choose *Preferences...* in the Tools menu. A form must e open for this menu to be active. The Preferences dialog box appears.
2. Deselect the *Show Form Assistant at Startup* option if you do not want Form Assistant to appear at startup. OmniForm will open a blank form instead the next time you launch it. Select the *Show Form Assistant at Startup* option if you want Form Assistant to appear at startup.
3. Click OK.

In the Form Assistant dialog box, deselect the *Show Form Assistant at Startup* option if you do not want Form Assistant to appear at startup. OmniForm will open a blank form instead the next time you launch it.

Select the *Show Form Assistant at Startup* option if you want Form Assistant to appear at startup.



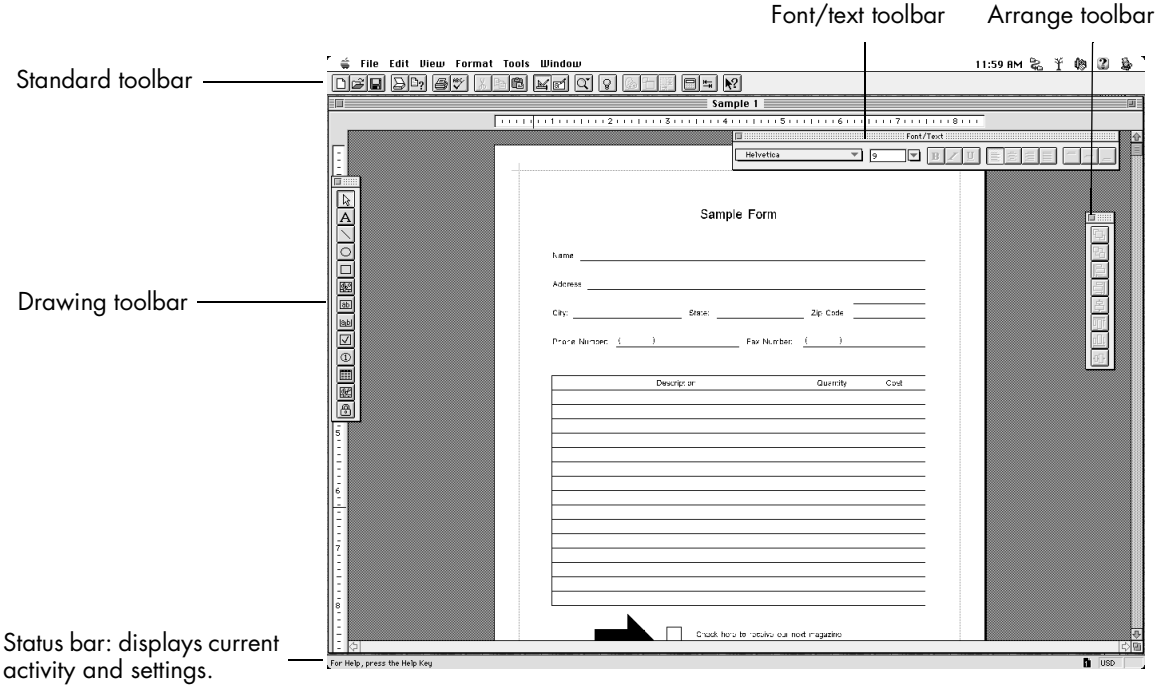
The Design View Window

This section provides an overview of the Design View window.

If a form is open in Fill View, click the Design button in the standard toolbar or choose *Design* in the View menu to switch to Design View.

As a handy shortcut, Control-click over a blank area in the form to open a shortcut menu. Choose *Design* in this menu.

The Design View window contains four toolbars and seven menus.



The Design View window also contains the calculation toolbar. Choose *Calculation* in the Tools menu to display this toolbar. See Chapter 9, Using Calculations, for detailed information.

Use Design View to edit and create fields on an existing form or to create an entirely new form.

For detailed information on Design View and designing forms, see Chapter 6, Designing a Form.

The Fill View Window

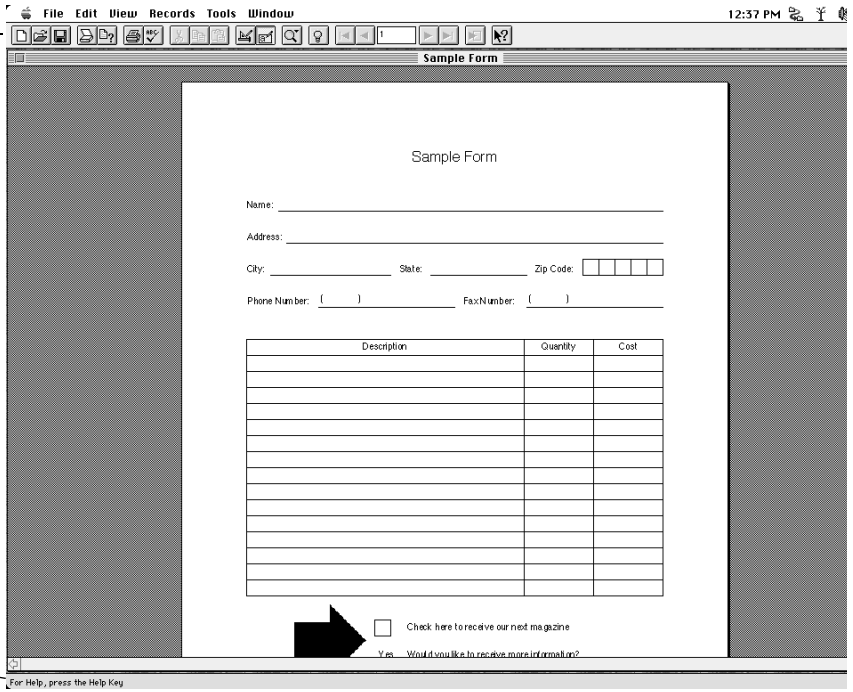
This section provides an overview of the Fill View window.

If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

As a handy shortcut, Control-click to open a shortcut menu. Choose *Fill* in this menu.

The Fill View window contains a toolbar and seven menus.

Standard toolbar



Status bar: displays current activity and settings.

Use Fill View to enter data in fields, create a records database, import and export information to and from records, and print, mail, or fax forms.

See Chapter 7, Filling a Form, for detailed information on how to enter text into fillable fields and move through a form.

See Chapter 8, Managing an OmniForm Database, for detailed information on database creation and management.

Form Usage Options

This section describes form usage: how it affects the forms you scan or import as image files, how to select form usage, and how to change it.

This section contains the following topics:

- Choosing a Form Usage Option
- Where to Select Form Usage Options
- Changing Form Usage

Choosing a Form Usage Option

Form usage affects the way you can use a form once it is in OmniForm.

Decide how you will use a form in OmniForm *before* you scan or import it: as a *designed* form, as an *original* form, or as a *non-designed* form image as described below.

OmniForm uses *Logical Form Recognition* (LFR) to identify text, rectangles, lines, and fillable areas when it designs a form during scanning or import.

Designed Form

Use this option if you want to be able to:

- have full control over a form's design
- edit all form elements in Design View
- create new objects in Design View
- fill fields in Fill View

A designed form does not retain graphics during Logical Form Recognition, but you can import graphics.

Original Form

Use this option if you want to be able to:

- have partial control over a form's design
- maintain a form's original look
- draw new fillable objects on the form in Design View
- fill fields in Fill View

Non-designed Form

This type of form has no fillable fields and no editable text. Basically, it is just an image, or picture, on your computer. Use this option if you want to be able to:

- input a form of such poor quality that it would cause recognition problems
- draw new fillable objects on the form in Design View
- print or fax the form only

See Chapter 6, Designing a Form, for information on adding graphics, creating objects, and using other design techniques.

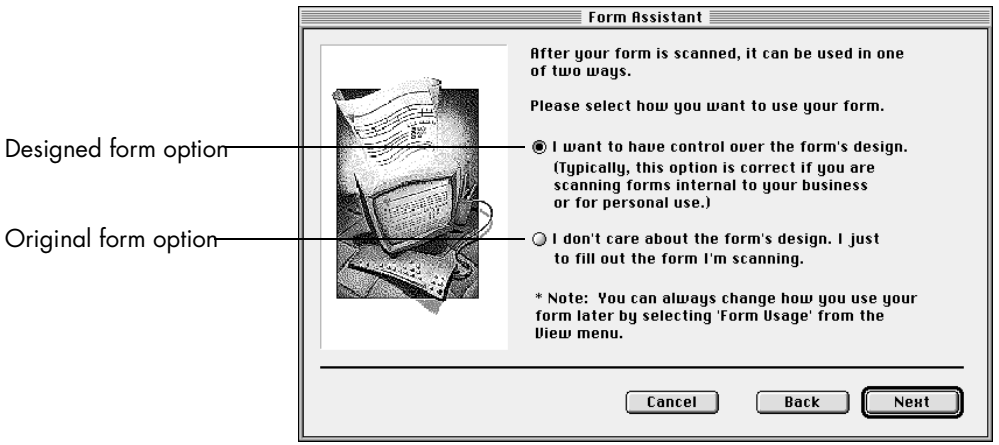
See Chapter 7, Filling a Form, for information on filling fields in Fill View.

Where to Select Form Usage Options

Different form usage options are available depending on whether you open Form Assistant or choose *Scan Form...* in the File menu.

Form Assistant

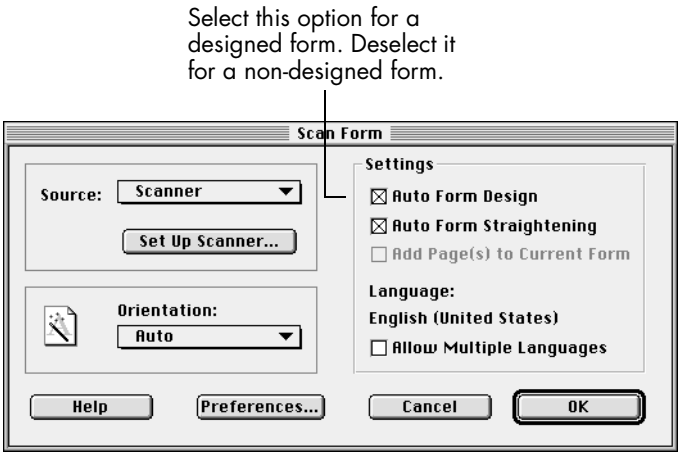
If you use Form Assistant, you can choose between the designed form and original form options.



This dialog box is one of several in Form Assistant; it appears during the scanning or import process.

Scan Form Dialog Box

If you use the *Scan Form...* command, you can choose between the designed form and non-designed form options.



Changing Form Usage

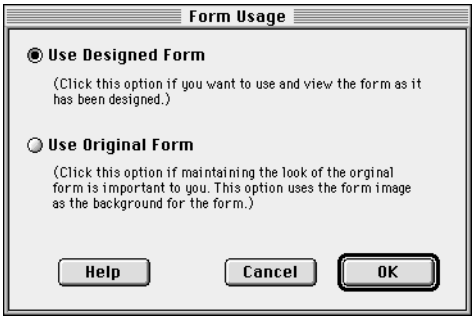
Choose *Form Usage...* in the View menu to change the way you can use a form. For example:

- You have an *original* form but decide to change the design.
  You would change the form to a designed form.
- You have a *designed* form that you have edited but want to fax the original form to someone.
  You would change the form to an original form.

There is no original view for a form that you design yourself in OmniForm.

To change form usage:

1 Choose *Form Usage...* in the View menu.
The Form Usage dialog box appears.



2 Select a form usage option.

- Select *Use Designed Form* to view the form as it was designed by OmniForm on import along with any changes you have made to the form's design.
  You can edit all text and fields, and add graphics to the form.
- Select *Use Original Form* to view the form as it looked originally, before you scanned or imported it to OmniForm.
  You can create, resize, move, delete, define, or change the appearance of fillable fields with this option. Changes you make to text, graphics, and non-fillable objects are not visible until you select *Use Designed Form.*

3 Click *OK.*
Your form changes to reflect the selected option.

You can change form usage for a *non-designed* form to a designed form. However, it will be blank except for any fillable objects you may have added.

Chapter 5

OmniForm Procedures

This chapter describes basic OmniForm procedures: how to turn your paper forms into electronic forms; how to fill, print, and fax forms; how to open forms to fill, redesign, and search for information.

This chapter contains the following sections:

- Scanning a Paper Form
- Importing an Image File
- Filling a Form
- Printing or Faxing a Form
- Searching a Form
- Opening a Form to Design
- Creating a New Form
- Opening a Form
- International Settings
- Menu Shortcuts

Scanning a Paper Form

This section describes how to use both Form Assistant and the *Scan Form...* command to turn your paper form into an electronic form.

You can scan paper forms directly into OmniForm if you have a scanner. Forms should be blank with crisp, dark text on a white background for best results.

You can use the Sample Form included with your OmniForm package as a test page if you like.

Scanning With Form Assistant

1 Double-click the OmniForm icon in the OmniForm folder.
If OmniForm is open, click the Form Assistant button in the standard toolbar to open Form Assistant.
Form Assistant appears.

2 Select *Scan in a form* and then click *Next>*.

3 Select *Scanner* in the next window and click *Next>*.

4 Select a paper size in the next window.
- Select *Letter* if the form is 8.5 by 11 inches.
- Select *Legal* if the form is 8.5 by 14 inches.
- Select *A4* if the form is 21 by 29.7 centimeters (European).

5 Click *Next>*.
The next window only appears if a form is open already. Proceed to step 7 if a form is not open.

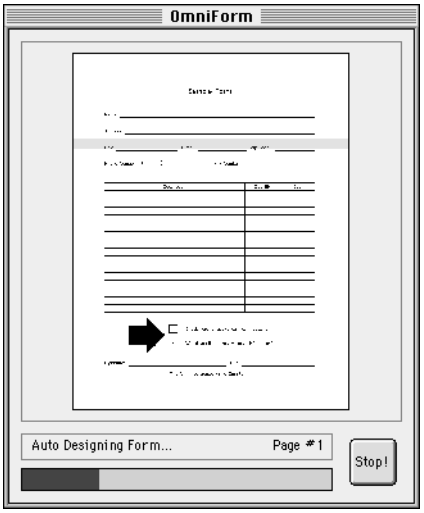
6 Select whether you want the scanned page to be a new form or to add the page to a currently open form in the next window, and then click *Next>*.

7 Select form usage in the next window.
- Select the first option if you want to edit or redesign a form.
- Select the second option if you do not want to edit or redesign a form, just fill it in.

8 Click *Next>*.
The last window prompts you to place a page in your scanner.

9 Make sure the page is aligned correctly in your scanner, and click *Finish.*

OmniForm scans the form. The OmniForm window displays scanning, designing, and straightening progress.



How your form appears in OmniForm depends on the form usage option you chose in Form Assistant.

10 Click the Save button in the standard toolbar or choose *Save...* in the File menu to name and save your file.

11 Begin to fill or edit your form.

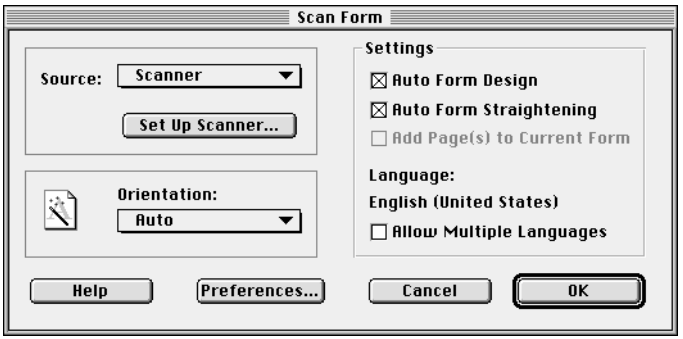
See Chapter 6, Designing a Form, for detailed information on defining, moving, resizing, and creating fields, and other design functions.

See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

Using the *Scan Form...* Command

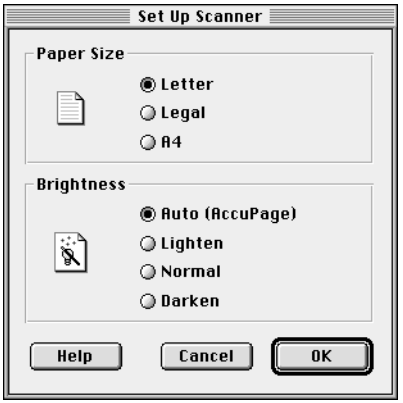
1 Click the Scan button in the standard toolbar or choose *Scan Form...* in the File menu.

The Scan Form dialog box appears.



2 Select *Scanner* in the *Source* pop-up menu.

3 Click *Set Up Scanner...* to choose a page size and adjust scanning brightness.



- Select an option under *Page Size*:
  Select *Letter* if the form is 8.5 by 11 inches.
  Select *Legal* if the form is 8.5 by 14 inches.
  Select *A4* if the form is 21 by 29.7 centimeters (European).
- Select a scanning brightness under *Brightness*.
  Select *Auto (AccuPage)* if your scanner supports HP AccuPage and your form is printed on colored, shaded, or smudged paper, or if it has very small type.

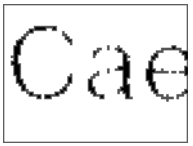
Select *Lighten* if the form has very thick or run-together text, or if the background is smudged, shaded, or colored.

Select *Normal* if the form has crisp, black text and objects on a white background.

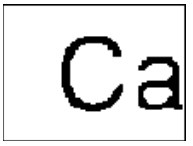
Select *Darken* if the form has very thin or broken text such as with a poor-quality fax or a copy of a copy.

Text on a shaded background. Select *Auto (AccuPage)*.

Thick, dark text. Select *Lighten*.



Thin, broken text. Select *Darken*.



Crisp, black text. Select *Normal*.

- Click *OK* to return to the Scan Form dialog box.

4 Select an option in the *Orientation* pop-up menu.

- Select *Auto* to have OmniForm determine orientation automatically.
- Select *Portrait* for a vertically oriented page.
- Select *Landscape* for a horizontally oriented page.
- Select *Flipped* to automatically rotate a portrait page 180 degrees during the scan.
- Select *Flipscape* to automatically rotate a landscape page 180 degrees during the scan.

The *Flipped* and *Flipscape* options are useful for scanning pages in a book to avoid turning it upside down or sideways.

5 Select import options.

- Select *Auto Form Design* to use Logical Form Recognition to recognize text and fillable fields in the form.

  This gives you full control over a form's design. Graphics are not retained but you can import them. See "Creating a Graphic Object" on page 6-8 for information on how to do this.

- Deselect *Auto Form Design* to scan a form without recognizing form design. Text and fillable fields are not recognized. This results in a *non-designed* form.

  This is useful if you just want to fax a form, or if the form is of such poor quality that it would cause recognition problems.
- Select *Auto Form Straightening* to have OmniForm automatically straighten a crooked page.

  This is useful if you scan a page in a large, unevenly cut, or thick document that is difficult to position correctly.
- Select *Add Page(s) to Current Form* to make the newly scanned page the next page in the current form.

  This option is only available if a form is open.

6 Verify that the selected language under *Language* is the one you want for your new form.

- To change the default language for the new form, click *Preferences...* to open a modified Preferences dialog box.
- Select a language in the *Language* pop-up menu.

  See "International Settings" on page 5-22 for more information on the international options.
- Click *OK* to return to the Scan Form dialog box.

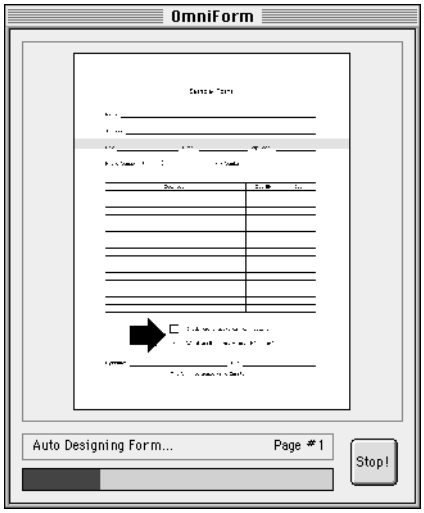
7 Select *Allow Multiple Languages* if your form contains more than one language that you want OmniForm to recognize.

This setting does not affect the selected language for your form set in the previous step.

Do not select this setting for a single-language form as optical character recognition (OCR) may not be as efficient.

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

OmniForm scans the form. The OmniForm window displays scanning, designing, and straightening progress if you selected those options.



How your form appears depends on whether or not you chose *Auto Form Design* in the Scan Form dialog box.

9 Click the Save button in the standard toolbar or choose *Save...* in the File menu to name and save your file.

10 Begin to fill or edit your form.

See Chapter 6, Designing a Form, for detailed information on defining, moving, resizing, and creating fields, and other design functions.

See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

See “Printing or Faxing a Form” on page 5-14 if you have a non-designed form.

Importing an Image File

This section describes how to use both Form Assistant and the *Scan Form...* command to import an image file as a recognized OmniForm form.

OmniForm can import and recognize black-and-white forms in either PICT or TIFF format. Image resolution must be 200, 300, or 400 dots per inch (dpi). If you have a fax modem, for example, you can receive a faxed form and use the fax program's software to save the file in PICT or TIFF format. OmniForm has the same import options for image files as it does for scanned forms.

Importing With Form Assistant

1 Double-click the OmniForm icon in the OmniForm folder.

Click the Form Assistant button in the standard toolbar if OmniForm is already open.

Form Assistant appears.

2 Select *Scan in a form* and then click *Next>*.

3 Select *Fax or Image File* in the next window to recognize a form that is in a supported image format.

This could be a form created in another program or one received as a fax file.

4 Click *Next>*.

5 Select a file in the next window.

- Click *Select...* if you need to locate a file.
- Select a file in the Select dialog box and click *Open* to return to Form Assistant.

6 Click *Next>*.

The next window only appears if a form is open already. Proceed to step 8 if a form is not open.

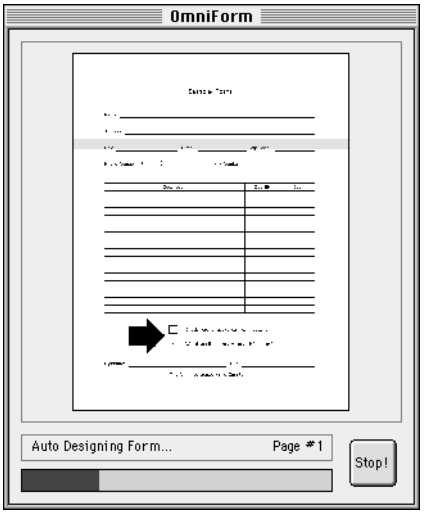
7 Select to have scan the page as a new form and click *Next>*, or to add the page to the currently open form and click *Finish>*.

8 Select form usage in the last window.

- Select the first option if you want to edit or redesign a form.
- Select the second option if you do not want to edit or redesign a form, just fill it in.

9 Click *Finish*>.

The OmniForm window displays scanning, designing, and straightening progress.



How your form appears in OmniForm depends on the form usage options you chose in Form Assistant.

10 Click the Save button in the standard toolbar or choose *Save...* in the File menu to name and save your file.

11 Begin to fill or edit your form.

See Chapter 6, Designing a Form, for detailed information on defining, moving, resizing, and creating fields, and other design functions.

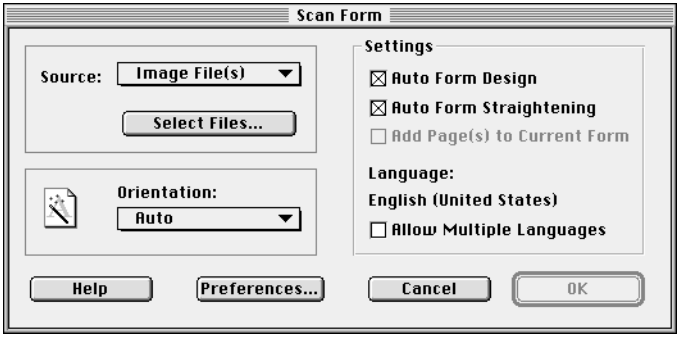
See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

Using the *Scan Form...* Command to Import

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

The Scan Form dialog box appears.

2 Select *Image File(s)* in the *Source* pop-up menu to recognize a form in a supported image format.



This could be a form created in another program or one received as a fax file.

3 Click *Select Files...* to open the Select Files dialog box.

- Locate and select a file.
- Click *Add File* to add the file to the *Files to Process* list box.

  You can select up to 20 files from one or more folders.
- Click *Done* to return to the Scan Form dialog box when you are done.

4 Select an option in the *Orientation* pop-up menu.

- Select *Auto* to have OmniForm determine orientation automatically.
- Select *Portrait* for a vertically oriented page.
- Select *Landscape* for a horizontally oriented page.
- Select *Flipped* to automatically rotate a portrait page 180 degrees during the scan.
- Select *Flipscape* to automatically rotate a landscape page 180 degrees during the scan.

The *Flipped* and *Flipscape* options are useful for scanning pages in a book to avoid turning it upside down or sideways.

5 Select import options.

- Select *Auto Form Design* to use Logical Form Recognition to recognize text and fillable fields in the form.

  This gives you full control over a form's design. Graphics are not retained but you can import them.

- Deselect *Auto Form Design* to scan a form without recognizing form design. Text and fillable fields are not recognized. This results in a *non-designed* form.

  This is useful if you just want to print or fax a form, or if the form is of such poor quality that it would cause recognition problems.

- Select *Auto Form Straightening* to have OmniForm automatically straighten a crooked page.

  This is useful if you are importing a received fax file that was skewed in the fax machine.

- Select *Add Page(s) to Current Form* to make the newly scanned page the next page in the current form.

  This option is only available if a form is open.

6 Verify that the selected language under *Language* is the one you want for your new form.

- To change the default language for the new form, click *Preferences...* to open a modified Preferences dialog box.
- Select a language in the *Language* pop-up menu.

  See "International Settings" on page 5-22 for more information on the international options.

  Click *OK* to return to the Scan Form dialog box.

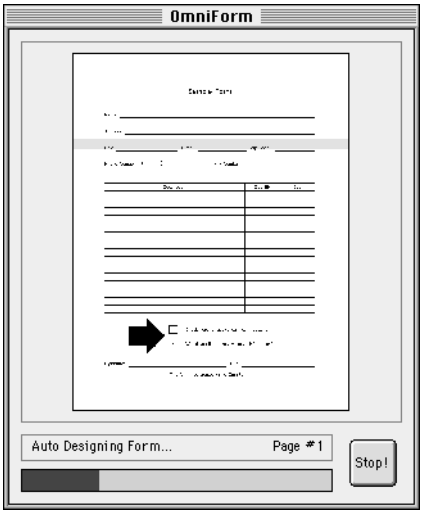
7 Select *Allow Multiple Languages* if your form contains more than one language that you want OmniForm to recognize.

This setting does not affect the selected language for your form set in the previous step.

Do not select this setting for a single-language form as optical character recognition (OCR) may not be as efficient.

8 Click *OK*.

OmniForm imports the form. The OmniForm window displays scanning, designing, and straightening progress if you selected these options.



How your form appears depends on whether or not you chose to have OmniForm design the form during import.

9 Click the Save button in the standard toolbar or choose *Save...* in the File menu to name and save your file.

10 Begin to fill or edit your form.

See Chapter 6, Designing a Form, for detailed information on defining, moving, resizing, and creating fields, and other design functions.

See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

See "Printing or Faxing a Form" on page 5-14 if you have a non-designed form.

Filling a Form

This section describes how to use both Form Assistant and the *Fill* command to open a form and fill it.

Filling Fields With Form Assistant

1 Double-click the OmniForm icon in the OmniForm folder.
Click the Form Assistant button in the standard toolbar if OmniForm is already open.
Form Assistant appears.

2 Select *Fill in a form* and click *Next>*.

3 Select which form to use in the next window.

- Select the first option and click *Select...* to open a form.
  Select a form in the Open dialog box and click *Open* to return to the Form Assistant dialog box.
- Select the second option to work with the current form.
  This option is available only if a form is open.

4 Click *Finish>* after you select an option.
OmniForm opens the selected form in Fill View.
See "The Fill View Window" on page 4-6 for a description.

5 Click in a field or press the Tab key to place the cursor in the first field.

6 Type the information you want to enter. Press the Enter key to add new lines to the current field.

7 Press the Tab key to move to the next field.
Press Shift-Tab to move to the previous field.

8 Continue to fill fields in this way.

See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

Using the *Fill* Command

1 If you have a form open and are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu.

2 Follow steps 5–8 in "'Filling Fields With Form Assistant" above.

Printing or Faxing a Form

This section describes how to use both Form Assistant and the *Print...* command to print or fax a form.

You must have fax hardware and software installed to fax a form. Refer to your fax documentation for instructions on how to set up your equipment for faxing. Faxing uses the *Print...* command. The word *print* in these instructions describes both printing and faxing.

Printing/Faxing With Form Assistant

1. Double-click the OmniForm icon in the OmniForm folder.
   Click the Form Assistant button in the standard toolbar if OmniForm is already open.
   Form Assistant appears.
2. Select *Print or fax a form* and click *Next>*.
3. Select which form to use in the next window.
   - Select the first option and click Select... to open a form.
     Select a form in the Open dialog box and click *Open* to return to the Form Assistant dialog box.
   - Select the second option to work with the current form.
4. Click *Next>* after you select an option.
5. Select what data to print or fax in the next window.
   - Select *Print or fax blank copies of the form* to print the form as it would appear in Design View, without any information in fillable fields.
   - Select *Print or fax filled in copies of the form* to print all text, graphics, and any information in fillable fields.
   - Select *Print the form's data over pre-printed forms* to print just the information you have typed in the fillable fields. Place the pre-printed form in your printer.
6. Click *Next>*.
7. Select how you would like the form to look in the next window.

- Select the first option to print the form as it was designed by OmniForm during import or by the person who designed it in OmniForm.
- Select the second option to print the form as it appeared when it was a hard copy, without any edits or redesign.

8 Click *Finish.*

The Print dialog box appears.

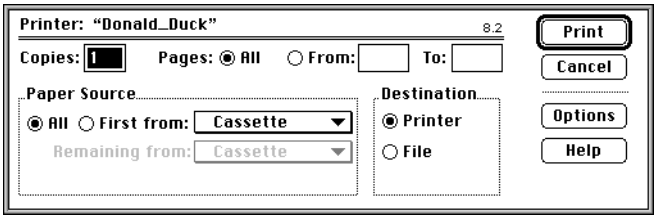
9 Select the desired print options and click *OK.*

See the next section for more information on print options.

OmniForm prints or faxes your form with the settings you chose. Depending on your fax software, more dialog boxes may appear after you click *OK* in the Print dialog box.

Using the *Print...* Command

1 Click the Print button in the standard toolbar or choose *Print...* in the File menu to open the Print dialog box.



2 Select an option in the *Form/Data* pop-up menu. These options are available only in Fill View.

- Select *Form and Data* to print all text, graphics, and any information in fillable fields.
- Select *Data Only* to print just the information you have typed in the fillable fields. This is useful if you want to print data over a pre-printed form.
- Select *Form Only* to print just the form without any information in fillable fields.

3 Select an option in the *Data* pop-up menu.

This option is only available if *Form and Data* or *Data Only* is selected in the *Form/Data* pop-up menu.

- Select *Current Record Only* to print just the current record.
- Select *Current Record Set* to print the current found set of records.

- Select *All Records* to print every record in the database.

4 Enter offset measurements under *Print offsets for data* if you want.

This is useful if you want to position data in a specific place on the page. This option is only available if *Data Only* is selected in the *Form/Data* pop-up menu.

5 Click *OK.*

OmniForm prints or faxes your form with the selected settings.

- Depending on your printer or your fax software, more dialog boxes may appear after you click *OK* in the Print dialog box. See your printer or fax documentation for information.
- The Print to File dialog box appears after you click *OK* if you selected the *Print to file* option in the Print dialog box. Select a location for the file, type a file name in the *File Name* text box, and click *OK.*

Searching a Form

This section describes how to use both Form Assistant and the *Search...* command to open a form and perform a search.

Searching With Form Assistant

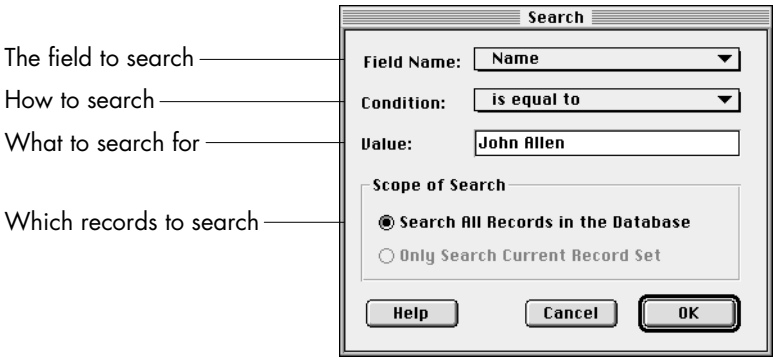
1 Double-click the OmniForm icon in the OmniForm folder.
Click the Form Assistant button in the standard toolbar if OmniForm is already open.
Form Assistant appears.

2 Select *Search a form for information* and click *Next>*.

3 Select which form to use in the next window.

- Select the first option and click *Select...* to open a form.
  Select a form in the Open dialog box and click *Open* to return to the Form Assistant dialog box.
- Select the second option to work with the currently open form.

4 Click *Finish>* after you select an option.
The Search dialog box appears.



5 Select the field to search in the *Field Name* pop-up menu.

6 Select how to search for the information in the *Condition* pop-up menu.

7 Type the information to find in the *Value* text box.

8 Select which records to search.

- Select *Search All Records in the Database* to search all records in the current database.
- Select *Only Search Current Record Set* to search the current found set of records. This option is available after a search.

9 Click *OK*.

OmniForm searches the records and finds any that contain the information you specified.

See "Searching Records for Information" on page 8-7 for detailed information on searching.

Using the *Search...* Command

1 If you have a form open and are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu.

2 Choose *Search...* in the Records menu.

The Search dialog box appears.

3 Follow steps 5–9 in the previous section.

Opening a Form to Design

This section describes how to use both Form Assistant and the *Design* command to open a form in Design View.

See Chapter 6, Designing a Form, for detailed information on designing and editing forms.

Opening a Form in Design View With Form Assistant

1 Double-click the OmniForm icon in the OmniForm folder.

Click the Form Assistant button in the standard toolbar if OmniForm is already open.

Form Assistant appears.

2 Select *Work on a form's design* and click *Next>.*

3 Select the form to use in the next window.

- Select the first option and click *Select...* to open a form.

  Select a form in the Open dialog box and click *Open* to return to the Form Assistant dialog box.

- Select the second option to work with the currently open form. This option is only available if a form is open already.

4 Click *Finish*.

OmniForm opens the selected form in Design View.

See "The Design View Window" on page 4-5 for a description.

Using the *Design* Command

If you have a form open and are in Fill View, click the Design button in the standard toolbar or choose *Design* in the View menu.

OmniForm displays the form in Design View.

Creating a New Form

This section describes how to use both Form Assistant and the *New* command to create a new form.

See Chapter 6, Designing a Form, for detailed information on form design.

Creating a New Form With Form Assistant

1. Double-click the OmniForm icon in the OmniForm folder. Click the Form Assistant button in the standard toolbar if OmniForm is already open.
   Form Assistant appears.
2. Select *Create a new, blank form.*
3. Click *Finish.*
   OmniForm opens a blank form in Design View.

Using the *New* Command

1. Click the New button in the standard toolbar or choose *New* in the File menu.
   OmniForm opens a blank form in Design View.
2. Use the Design View tools to create fields and objects on your new form.

Opening a Form

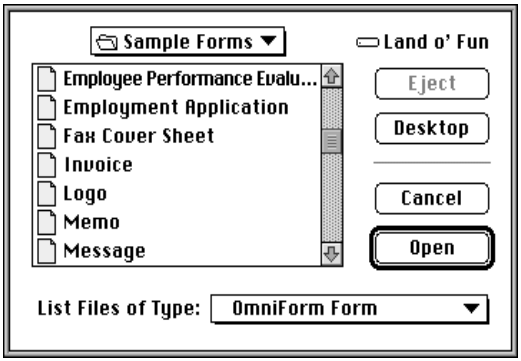
This section describes how to use the *Open...* command to open a form. You can have up to 20 forms open at the same time.

To open a form:

1 Double-click the OmniForm icon in the OmniForm folder.

2 Click *Cancel* in Form Assistant if it appears.

3 Click the Open button in the standard toolbar or choose *Open...* in the File menu to open the Open dialog box.



4 Make sure *OmniForm Form* is selected in the *List Files of type* pop-up menu.

Select *All Files* instead to open a form created in any version of OmniForm for Windows. Otherwise, only forms created on the Macintosh are displayed. You can use the PC Exchange control panel to make PC forms show as OmniForm forms.

5 Locate and select a file.

6 Click *Open*.

The form opens in the last view in which it was saved.

See Chapter 6, Designing a Form, for detailed information on defining, moving, resizing, and creating fields, and other design functions.

See Chapter 7, Filling a Form, for detailed information on the kinds of fields you may find on a form and how to fill them.

International Settings

This section describes how OmniForm supports different language and cultural conventions. You can choose from 45 different *locales* in the *International* tab in the Preferences dialog box. A locale — as defined for OmniForm usage — is a combination of a language and a region. The language you select for a particular region affects how your form displays currency, numbers, and dates.

Selecting a Language for Your Form(s)

1. If you are in Fill View, click the Design button in the standard toolbar or choose *Design* in the View menu.
2. Choose *Preferences...* in the Tools menu.
3. Click the *International* tab.
   There are two options: *Current Form* and *New Forms.*
4. Click *Current Form.*

The *Language* pop-up menu displays the language being used for the currently open form. If you have the International English or German version of OmniForm, or multiple dictionaries, a dictionary in this language will also be used during a spell check.

You cannot change the *Current Form* option if you open the Preferences dialog box in Fill View.

5 Select a different language for the current form if you like.

Changing the language of the current form could cause OmniForm to misinterpret any data already entered in that form. OmniForm warns you of this if at least one field is filled and you change the *Current Form* selection.

6 Click *New Forms.*

The *Language* pop-up menu displays the default language that will be used for the next form you open, scan, or import.

The language selected for a new form will also become the *Current Form* selection when that form opens in OmniForm.

7 Select a different default language for new forms if you like.

8 Click *OK.*

How OmniForm Uses Language Selections

The *Current Form* language selection affects:

- The formatting of currency, number and date entries in the currently open form.
- Which dictionary is used for spell checking. (The International English version contains all available dictionaries. Other users can call 800-654-1187 to order additional dictionaries.)
- The international symbol that appears in the status bar when a form is open.

The *New Form* language selection affects:

- The formatting of currency, number and date entries in new forms you create by scanning or importing, or by choosing *New* in the File menu.
- The international symbol that appears in the status bar when no form is open.

Selections made in the *International* tab do not affect selections made in the Numbers, Keyboard, or Date & Time control panels and vice versa.

The Options Dialog Box Readouts

Below the *Language* selection, OmniForm displays readouts: the international symbol for the selected language (which appears in the status bar); and currency, number, and date conventions specific to that language.

The readouts show:

- How OmniForm expects data to be entered in Fill View.
- How OmniForm will format data in Fill View if it is not entered correctly. (Formatting takes place after you move the cursor out of a field.) See the next section for formatting examples.

Formatting Examples

Currency

If you selected *German (Austrian)* as the *Current Form* language, the numbers `123456` entered in an appropriately defined currency field would display as `öS 1.234,56`.

If you selected *German (Liechtenstein)* as the *Current Form* language, the numbers would display as `CHF 1'234.56`.

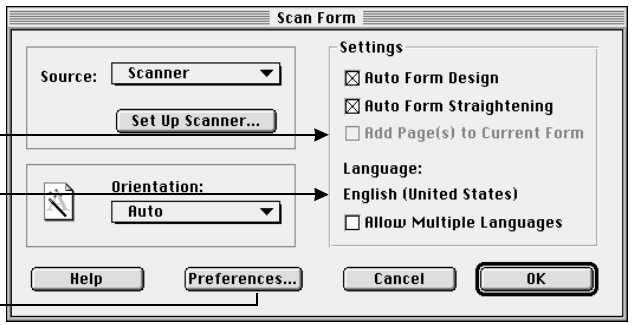
Date

If you selected *English (United States)* as the *Current Form* language, the date `2/5/96` entered in an appropriately defined date field would display as `February 5, 1996`.

If you selected *German (Standard)* as the *Current Form* language, the date would display as `2. Mai 1996`.

The Scan Form Dialog Box

The *New Form* language selection appears in the Scan Form dialog box.



You cannot change the *New Forms* language if this option is selected.

New Forms language selection

Click *Preferences...* to change the *New Forms* language selection.

This becomes the *Current Form* language after the form is in OmniForm.

- Click *Preferences...* to change the language for your new form. You cannot change the *New Form* language selection if *Add Page(s) to Current Form* is checked because a language is already associated with the current form. A form can have only one selected language.
- If you select *Add Page(s) to Current Form*, the *Language* display changes to reflect the *Current Form* language if it is different.

The Object Definition Dialog Box Options

The *Current Form* language selection affects available formatting options for fillable objects defined as type *Number, Date,* or *Currency* in the Object Definition dialog box. For example, the long-date format for English (United States) is `MMMM dd, yyyy`. The long-date format for German (Standard) is `d. MMMM yyyy`.

The *Allow Multiple Languages* Option

How it Works

You can select *Allow Multiple Languages* in the Scan dialog box for multiple-language forms. OmniForm will then recognize all characters in all languages it supports. The setting does not affect the language(s) selected for your form in the Preferences dialog box and vice versa.

When you select *Allow Multiple Languages,* OmniForm turns off dictionaries during optical character recognition (OCR) so that *all* recognizable characters are allowed. If dictionaries were on, special characters such as umlauts might be discarded or questionable words in one language could be mistaken for words in another language.

Do not select *Allow Multiple Languages* for a single-language form. OCR may not be as efficient with dictionaries turned off.

Selecting the *New Forms* Language

Determine which language composes the majority of your form and select that as the *New Form*s language before scanning. To do so, click *Preferences...* in the Scan Form dialog box.

Remember that the selected language affects sort order and how dates, numbers, and currency are formatted in Fill View. See "Multiple Languages" on page 7-10 for information on spell-checking a form with multiple languages.

Menu Shortcuts

Use a Control-click to access the two available OmniForm shortcut menus. Select a command in a shortcut menu just as you would in the regular menu bar.

Where to Click	Available Commands
an empty spot in the form	Cut, Copy, Paste, Design, Fill, Go To Page
a selected object	Cut, Copy, Paste, Object Appearance, Object Definition, Size and Position, Font, Text, Table AutoFormat (when clicking on a table)

Use the online help for a description of each menu command.

Chapter 6

Designing a Form

This chapter discusses how to design new forms and edit existing ones in OmniForm. OmniForm contains numerous tools in Design View that let you create fields and objects, define calculations, and decide how your form will look.

This chapter contains the following sections:

- The Design Process
- The Design View Toolbars
- Creating Objects
- Defining Objects
- Changing Object Appearance
- Redesigning Your Form
- Using the Scrap Album

The `Sample Forms` folder in the `OmniForm` folder contains many sample forms that you can use or redesign for your needs.

The Design Process

This section gives a brief overview of how to design a new form. A form can be as simple as you need or as complex as OmniForm allows. Although the steps below are not required, they are recommended.

See "Tutorial 3 — Design Your Own Form" on page 3-21 for step-by-step instructions on designing a form.

See "Redesigning Your Form" on page 6-33 for information on how you can change existing forms.

To design a new form:

1. Open a new, blank form.
2. Choose *Page Setup...* in the File menu.
3. Select page size, orientation, and margins, and click *OK.*
4. Choose *Save As...* in the File menu.
5. Assign your form a name and location, and then click *OK.*
   Remember to save periodically so you do not lose any work.
6. Use the drawing toolbar to create objects on the form.
7. Choose *Object Definition...* in the Format menu to define the objects you created.
   You can assign unique names, filling, and validation properties for each selected object.
8. Choose *Object Appearance...* in the Format menu to set the new object's appearance if necessary.
   You can set borders, background color, and other properties.
9. Use the font/text toolbar to format both text objects and fillable objects.
   Text entered in Fill View will take on the formatting you specify in Design View.
10. Drag the objects where you want them on the form and use the arrange toolbar to align and arrange them.
11. Choose *Tab Order...* in the Tools menu to set a logical tabbing order for filling the form when it is in Fill View.
12. Test your form in Fill View.

See the appropriate sections in this chapter for detailed information on these steps as well as other Design View tools such as the Scrap Album.

The Design View Toolbars

This section describes each toolbar in Design View and defines its buttons. Design view contains five toolbars:

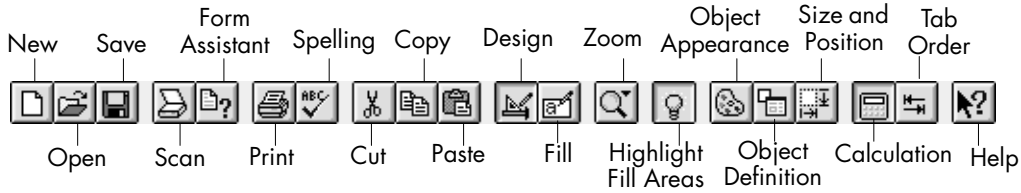
- the standard toolbar
- the font/text toolbar
- the drawing toolbar
- the arrange toolbar
- the calculation toolbar (See Chapter 9, Using Calculations, for information on this toolbar and its functions.)

Choose *Toolbars...* in the View menu to open the Toolbars dialog box and select the toolbars to view. You can also use the Tools menu to show/hide the toolbar. Choose *Calculation* in the Tools menu to view the Calculation toolbar.

Click the Help button in the standard toolbar and click on any toolbar button to see its function.

The Standard Toolbar

Use the standard toolbar for basic file operations such as saving and printing. Use it also to define and format the fields you create.

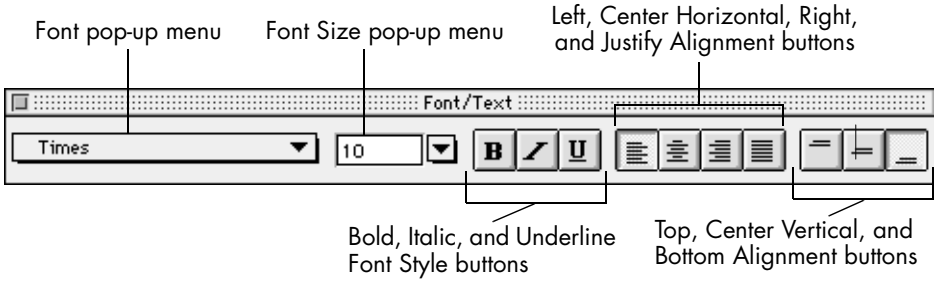


All buttons correspond to menu commands of the same name.

Processes such as scanning or opening a form are explained in Chapter 5, OmniForm Procedures.

The Font/Text Toolbar

Use the font/text toolbar to format text. This toolbar is only active when a text, fill text, comb, comb element, circle text, or table cell object is selected.



The pop-up menus and buttons correspond to options in the Font or Text dialog boxes (choose *Font...* or *Text...* in the Format menu). Each button displays a thumbnail example of how it formats text.

Text entered in Fill View displays the formatting you specify in Design View.

The Arrange Toolbar

Use the arrange toolbar to arrange and align objects on a form.

These buttons correspond to the *Align*, *Bring to Front*, and *Send to Back* commands in the Format menu. The last six buttons on the toolbar are only active when multiple objects are selected. The illustration on each button gives a thumbnail example of how it aligns objects.

The Drawing Toolbar

Use the drawing toolbar to create and select objects.

Selection tool

Text tool

Line tool

Oval tool

Rectangle tool

Graphic tool

Fill Text tool

Comb tool

Check Box tool

Circle Text tool

Table tool

Fill Graphic tool

Lock On/Off tool

See “Creating Objects” on page 6-6 for detailed information on using the drawing tools.

Creating Objects

This section explains how to create objects. You can create fillable objects that a user fills in Fill View, and non-fillable objects such as lines and rectangles. You will learn how to use all the tools in the drawing toolbar.

See "Defining Objects" on page 6-16 information on how to define objects after you create them.

See Chapter 7, Filling a Form, for detailed information on how to fill objects (fields) in Fill View.

This section discusses general creation guidelines and then lists all objects in the same order as they appear in the drawing toolbar. All instructions assume that you are in Design View.

General Creation Guidelines

Use the same basic steps to create most objects. Some objects require more steps as described in the following sections.

To create an object:

1 Click a tool in the drawing toolbar.

2 Click anywhere on the form to create an object of a default size, or hold down the mouse button and drag the tool to make the object the size you want.

3 While drawing, hold down the Shift key to:

- Make a rectangle object a square.
- Make an oval object a circle.
- Keep a line object straight.

4 With the object still selected, you can:

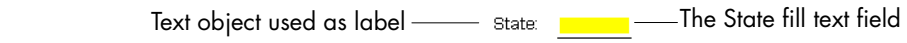
- Type text if it is a text or a circle text object.
- Choose *Object Definition...* in the Format menu to define a fillable object. See "Defining Objects" on page 6-16.
- Choose *Object Appearance...* in the Format menu to set the object's appearance. See "Changing Object Appearance" on page 6-29 for information.
- Hold down the Option key and drag the object to copy it.

5 Drag the object where you want it on the form.

When the object is no longer selected, the drawing tool reverts to the Selection tool unless the Lock tool is on.

Creating a Text Object

A text object is most often used as a title, label, or header.



1. Click the Text tool in the drawing toolbar.
2. Draw the text object.
3. With the object still selected, type the text you want to replace the word *Label*.

Creating a Line Object

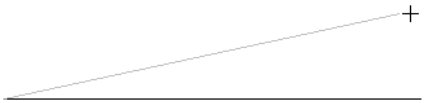
Use a line object to separate sections of a form or as a design element.

1. Click the Line tool in the drawing toolbar.
2. Draw a line.

To make sure a line is perfectly straight, hold down the Shift key while you draw.

To rotate a line:

1. Click the Selection tool and select the line to edit.
   A handle appears on each end of the line.
2. Place the cursor over one handle.
3. When the cursor turns into a crosshair, hold down the mouse key and drag the end of line where you want it.



To rotate the line in 45-degree increments, hold down the Shift key while pulling one of the handles in the desired direction.

Creating an Oval Object

Use an oval object to highlight areas on a form or as a design element. See how the rectangle object is used in the next example.

1 Click the Oval tool in the drawing toolbar.

2 Draw an oval.

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

Creating a Rectangle Object

Use a rectangle object to highlight areas on a form or as a design element.

1 Click the Rectangle tool in the drawing toolbar.

2 Draw a rectangle.

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

Creating a Graphic Object

Use a graphic object to illustrate text or as a design element. Create a graphic object when you want the same graphic to appear in every copy of the form such as a company logo.

Because OmniForm recognizes characters, not graphics, while designing a scanned or imported form, you must import the graphics you want. There are two ways to import a graphic in Design View:

- Copy a graphic from the original form to the designed form.
  See “Copying a Graphic From the Original Form” on page 6-10 for instructions.
- Import an existing graphic.
  See the next section for instructions.

Importing a Graphic

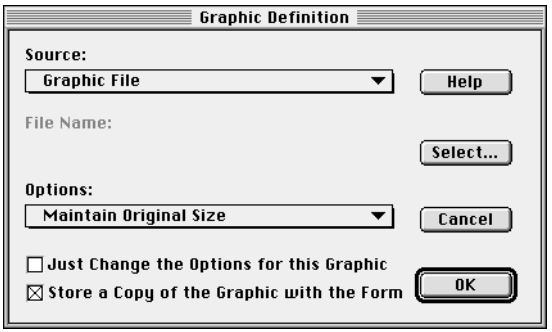
1 Click the Graphic tool in the drawing toolbar.

2 Draw a graphic object.

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

3 With the object still selected, click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

The Graphic Definition dialog box appears.



4 Select *Graphic File* in the *Source* pop-up menu.

5 Click *Select...* to open the Select dialog box.

- Locate and select a file.
- Click *Open* to return to the Graphic Definition dialog box.

The name of the selected file appears.

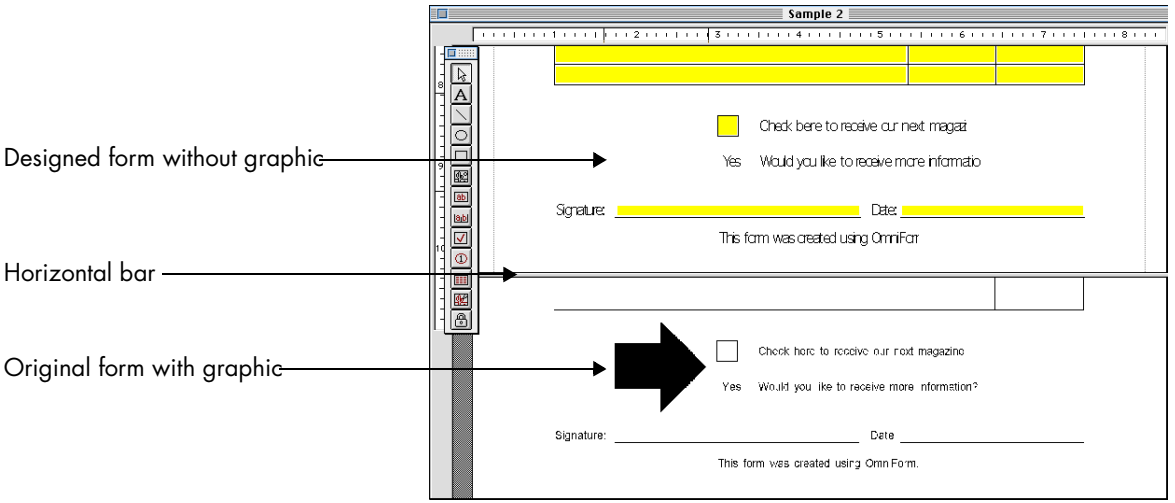
6 Proceed to "Graphic Definition Options" on page 6-12 to continue.

Copying a Graphic From the Original Form

1 Choose *Form Image* in the View menu.

This command is only available when a form has an original view. It is not available for forms you design in OmniForm.

The screen splits to show the form both as it was designed with Logical Form Recognition and as it was scanned originally.



2 Locate the graphic you want to copy from the original form.

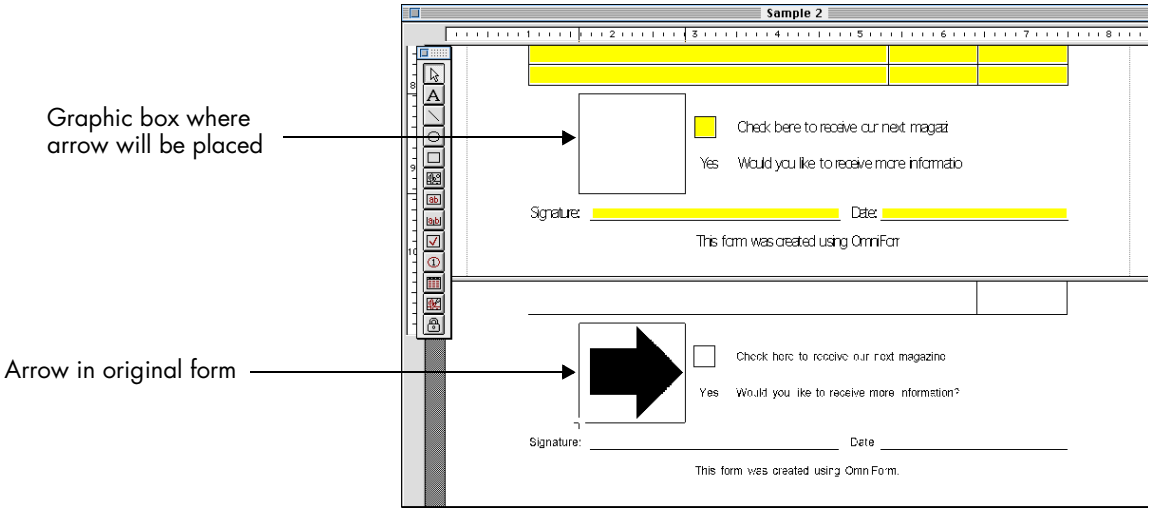
Each view window has its own scroll bar so you can scroll to the same place in each form. Click a window to make it active. You can use the horizontal bar in-between the two windows to resize the view.

3 Your cursor turns into a resize cursor over the bar.

4 Click the Graphic tool in the drawing toolbar.

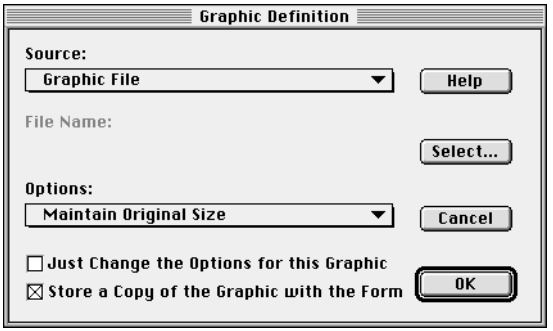
5 Place the cursor in the top window and draw a box by using the graphic in the bottom window as a guide.

A corresponding box appears in the top window.



6 With the object still selected, click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

The Graphic Definition dialog box appears.



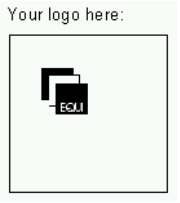
7 Select *Form Image* in the *Source* pop-up menu.

8 Proceed to "Graphic Definition Options" on page 6-12.

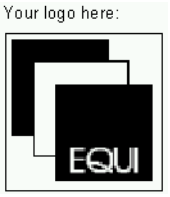
Graphic Definition Options

1 Select options for the graphic.

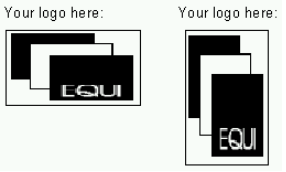
- Select *Maintain Original Size* to import the graphic without changes.



- Select *Scale Proportionally* to fit the graphic in the fill graphic field while maintaining its exact proportions.



- Select *Stretch to Fit* to change your graphic's original shape and size to fit in the fill graphic field.



This option does not maintain a graphic's original proportions. Depending on the shape of the fill graphic field, your graphic may be stretched or compressed. You might want to use this for special effects.

- Select *Just Change the Options for this Graphic* if the graphic object contains a graphic already.

  This changes how the graphic appears without reimporting it.

- Select *Store a Copy of the Graphic with the Form* to place a copy of the graphic directly in the form. This increases form size depending on graphic file size. Otherwise, OmniForm loads the graphic each time you open the form. If you move the

original graphic, OmniForm cannot load it and it will not appear in the form until you reimport it.

This option only appears if *Graphic File* is selected in the *Source* pop-up menu.

2 Click *OK*.

OmniForm scans or loads the graphic, depending on the selected source. The graphic appears in the Graphic object box.

Creating a Fill Text Object

Use a fill text field wherever you want to enter text in Fill View. Fill text fields are commonly used for information such as name, company, address, comments, and so forth.

1 Click the Fill Text tool in the drawing toolbar.

2 Draw the fill text object.

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

Creating a Comb Object

Use a comb field to separate information into separate groups of elements while maintaining the field as a whole. For example, United States forms typically require that you enter zip code numbers in five or nine separate boxes. In most languages, phone numbers are separated into several boxes.

1 Click the Comb tool in the drawing toolbar.

2 Either click anywhere on the form to create a four-element table, or hold down the mouse button and drag the cursor slowly.

The number of elements in the comb field increases as you drag the mouse. Release the mouse button when the comb field contains the number of elements you want.

Many sample forms included with your OmniForm package, such as the Objects form, contain comb objects that you can copy and paste into your own form. You can also copy objects from the Scrap Album.

Creating a Check Box Object

Use check boxes for *Yes/No* questions and for selecting one or more choices on a form.

1 Click the Check Box tool in the drawing toolbar.

2 Draw a check box.

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

Creating a Circle Text Object

Use circle text objects for *Yes/No* questions and for selecting one or more choices on a form (see the example in the previous section).

1 Click the Circle Text tool in the drawing toolbar.

2 Draw a circle text object.

To create a circle instead of an oval, hold down the Shift key as you draw.

3 With the object still selected, type the text you want to replace the number in the object.

Creating a Table Object

Use a table to enter information for order forms, invoices, comparison charts, purchase orders, and so forth.

A table consists of cells. Each cell contains a fill text object by default, with the exception of the header. The header cells contain text objects by default.

You can convert these objects to any other kind of object. You can insert any object in a table cell. Cells can contain multiple objects.

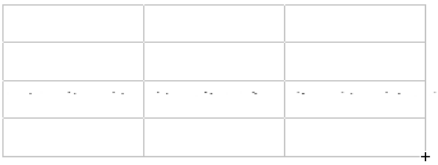
See "Redesigning a Table" on page 6-38 and "Placing Objects in Table Cells" on page 6-42 for more information on tables.

To create a table object:

1 Click the Table tool in the drawing toolbar.

2 Either click anywhere on the form to create a table, or hold down the mouse button and drag the cursor slowly.

The number of rows and columns in the comb field increase as you drag the mouse. Let go of the mouse button when the table contains the number of rows and columns you want.



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

Creating a Fill Graphic Object

Use a fill graphic object to illustrate text, such as a diagram, or as a design element, such as a company logo. You can only fill a fill graphic in Fill View.

A fill graphic can be different for every copy of a form in your file because it is filled in Fill View. Create a graphic object instead if you want the same graphic to appear in every copy of the form.

To create a fill graphic object:

1 Click the Fill Graphic tool in the drawing toolbar.

2 Draw the fill graphic object.

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

Defining Objects

This section describes the options in the Object Definition dialog box and how they affect a selected object. The dialog box varies according to the selected object and form language. Each definable object is described in this section in the order it appears in the drawing toolbar.

When you define an object you can:

- Give it a unique name that is useful when sorting or searching records, arranging tab order, or defining calculations.
- Provide filling options such as a list of possible entries and help messages that appear in Fill View.
- Set validation options such as whether a field must be filled or can be skipped.

See the previous section, "Creating Objects" on page 6-6 to learn how to create objects. See "International Settings" on page 5-22 for information on selecting a form language.

To define an object:

1 Select a fillable object on your form, a fillable object in a table cell, or a comb element in Design View.

You cannot define non-fillable objects such as lines.

2 Click the Object Definition button in the standard toolbar or choose *Object Definition...* in the Format menu.

As a handy shortcut, Control-click over the selected object to open a shortcut menu. Choose *Object Definition...* in this menu.

The dialog box that appears varies depending on the selected object. See the following sections for descriptions of the definition options available for each type of fillable object in a form.

Defining a Graphic Object

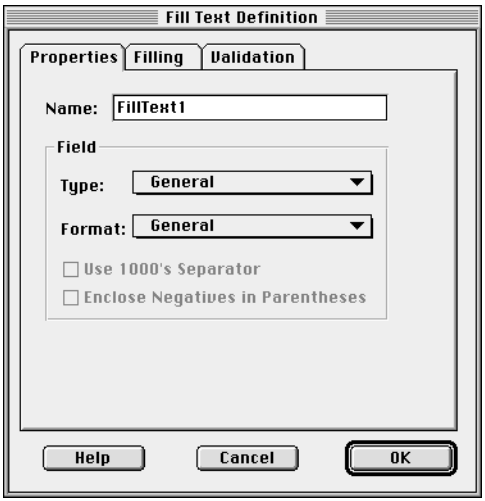
See "Creating a Graphic Object" on page 6-8 for detailed information.

Defining a Fill Text Object

Choose *Object Definition...* in the Format menu to open the Fill Text Definition dialog box when a fill text object is selected.

Set Property Options

1 Click the *Properties* tab.



2 Type a unique name in the *Name* text box.

Each object must have a unique name. A descriptive name such as *Address* makes a field easy to find when sorting, searching, defining calculations, and so forth.

3 Select a type in the *Type* pop-up menu.

Type information is displayed in the status bar in Fill View when the cursor is in that field. This helps the user know what kind of entry is expected in each field. Field type also helps OmniForm match data when sorting records and importing and exporting information.

4 Select a display format in the *Format* pop-up menu.

The format you select affects how field information is displayed in Fill View. Options vary according to the *Type* selection.

- If you selected *Currency* as the *Type,* for example, you might select *$0.00* as the format. If you entered `7889` in the field, OmniForm would format the entry as `$7889.00`. Formatting

takes effect after you move the cursor out of a field in Fill View.

- A *General* format leaves the field entry exactly as it is entered. In the above example, `7889` entered in the field would be displayed as `7889`.
- Field type also affects field validation. You can require that the field entry match the field type. See "Set Validation Options" on page 6-20 for information.

The next two options are enabled when *Number, Currency,* or *Percentage* is selected in the *Type* pop-up menu.

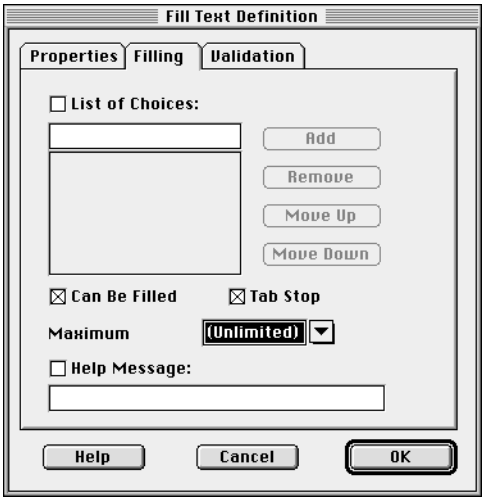
5 Select *Use 1000's Separator* to separate a series of three digits with a separator specific to the form's language.

See "International Settings" on page 5-22 for detailed information on selecting a language for a form.

6 Select *Enclose Negatives in Parentheses* to display negative numbers within parentheses in the field; for example, `-123` would display as `(123)`.

Set Filling Options

1 Click the *Filling* tab.

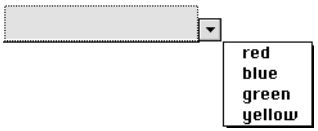


2 Select *List of Choices* if you want to be able to select a field entry from a pop-up menu of choices in Fill View.

- Type an entry in the text box below the option and click *Add* to place it in the list box.

You can enter up to 100 entries. Each entry can be up to 100 characters long.

- Select an entry in the list and click *Move Up* or *Move Down* to reorder it.
- Select an entry in the list and click *Remove* to remove it.
- A field with a list of choices looks like this in Fill View:



A pop-up menu arrow appears when the cursor is in the field. Click the arrow to open the list and select an entry. The entry appears in the field.

3 Deselect *Can Be Filled* so an empty field cannot be filled and a filled field cannot be changed in Fill View.

The *Can Be Filled* option, when deselected, overrides the *Must be Filled in* option when it is selected in the *Validation* tab.

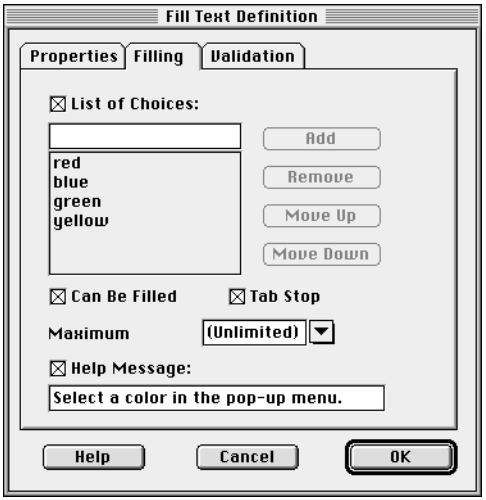
---

4 Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key. Deselect *Tab Stop* so that the cursor tabs past the selected field.

5 Select the maximum numbers of characters that can be entered in the field in the *Maximum* pop-up menu. (You can also type in a number.)

6 Select *Help Message* to type a message that appears in the status bar in Fill View when the cursor is in that field.

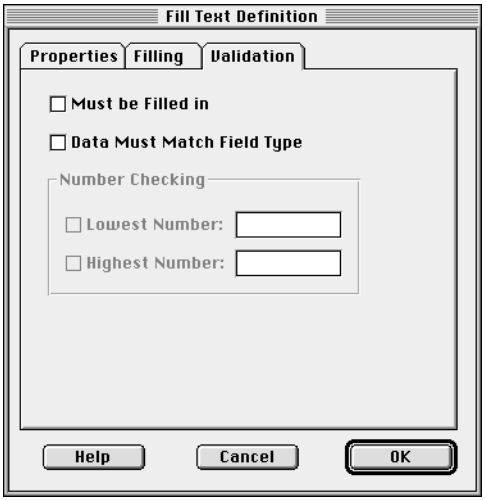
In the example below, the help message tells the user how to fill the field.



A help message can be up to 100 characters long.

Set Validation Options

1 Click the *Validation* tab.



2 Select *Must be Filled in* to display a prompt in Fill View if the user does not fill the field.

The *Can Be Filled* option in the *Filling* tab, when deselected, overrides the *Must be Filled in* option when it is selected.

3 Select *Data Must Match Field Type* to display a prompt in Fill View if the user enters incorrect information in the field.

If the field type is *Number,* for example, the user cannot enter text in the field; *5* is acceptable but *five* is not.

4 Select an option under *Number Checking* to display a prompt in Fill View if a user enters numbers outside the set range.

Number Checking is enabled when *Number, Currency,* or *Percentage* is the selected type in the *Properties* tab.

- Select *Lowest Number* and enter a number in the text box.

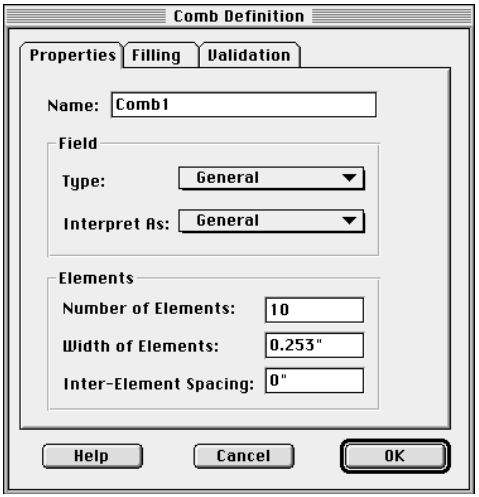
  Numbers entered in the selected field must be equal to or greater than this number.
- Select *Highest Number* and enter a number in the text box.

  Numbers entered in the selected field in Fill View must be equal to or lesser than this number.

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

Defining a Comb Object

Choose *Object Definition...* in the Format menu to open the Comb Definition dialog box when a comb object is selected.



This dialog box contains most of the same options as the Fill Text Definition dialog box with these exceptions:

- It contains an *Interpret As* pop-up menu instead of a *Format* pop-up menu.
- It contains an *Elements* section.
- It contains a *Fill Right to Left* option.

These options are described in this section. See "Defining a Fill Text Object" on page 6-17 for detailed information on the other options.

Interpret As

Your selection determines the way information entered in the Comb field will be used when searching, sorting, importing, and exporting. Available options vary according to the *Type* selection.

For example, suppose you selected *Number* in the *Type* pop-up menu and *0.00* in the *Interpret As* pop-up menu. If you entered `1234` in the field in Fill View, OmniForm would interpret this number as `12.34` even if the comb did not contain a decimal point as a *prefill* element. A search for `12.34` would return this record.

A specific *Interpret As* setting is not necessary when you define the correct prefill elements in a comb object, such as a decimal point. OmniForm would know the entry was a decimal number in this case even if you selected the *General* option in the *Interpret As* pop-up menu.

Element Options

1. Click the *Properties* tab.
2. Type a number in the *Number of Elements* text box.
   A zip code field for the United States, for example, would have either five or nine elements.
3. Type a number in the *Width of Elements* text box to set how wide all comb elements will be.
   You can resize individual elements later if you want to change their width.
4. Type a number in the *Inter-Element Spacing* text box to set the amount of space between each comb element.
   You can resize individual elements later if you want to change inter-element spacing.

Fill Right to Left Option

1 Click the *Filling* tab.

2 Select *Fill Right to Left* if you want the first character in the comb field to appear in the rightmost element and move left as other characters are added.

You would still read this entry from left to right.

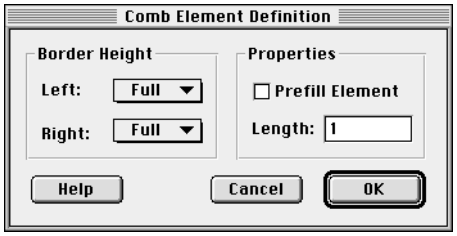
This is useful for entering decimal numbers, such as percentage and currency amounts, in fields with a prefill decimal point element. When entering `$598.07` in a field, for example, `07` would always appear after the decimal point. This would not always happen if the numbers were entered from left to right.

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

See "Defining a Comb Element Object" on page 6-23 for more information.

Defining a Comb Element Object

Choose *Object Definition...* in the Format menu to open the Comb Element Definition dialog box when a comb element is selected.



To define a comb element:

1 Select left and right border measurements under *Border Height*.

This sets the left and right border height of each element. You might, for example, select *1/2* to use the popular half-border height often seen on forms. (You will also have to use the *Object Appearance* command to further define borders.)

2 Select *Prefill element* to place a hyphen in the selected element.

This is useful for phone numbers and other hyphenated numbers. You can select this element in Design View and change it to another character such as a parenthesis.

3 Type a number in the *Length* text box.

This tells OmniForm how many characters to allow in the selected element before moving to the next element. In some countries, for example, the length of the area code element in a phone number is 3.

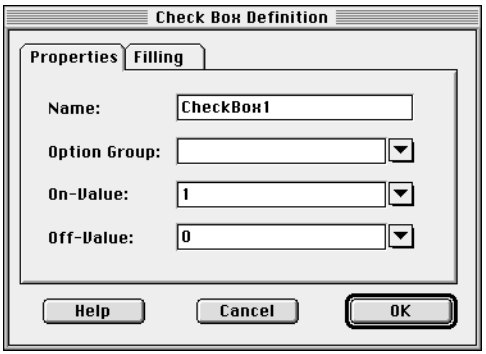
4 Click *OK* to apply the changes.

Defining a Check Box Object

Choose *Object Definition...* in the Format menu to open the Check Box Definition dialog box when a check box object is selected.

Set Property Options

1 Click the *Properties* tab.



2 Type a unique name in the *Name* text box.

Each object must have a unique name. A descriptive name such as *Yes Check Box* makes a field easy to find when sorting, searching, defining calculations, and so forth.

3 Type a group name in the *Option Group* pop-up menu if the check box belongs to an option group.

Creating an option group restricts you to one selection per check box group. Selecting a check box in an option group automatically deselects any checked box in the same group.

The group name you enter automatically appears in the *Option Group* pop-up menu of the next check box you create. Select this name to include the check box in the group.

4 Select or enter an option in the *On-Value* pop-up menu.

The on-value is stored in the database when the check box is selected. This is the value OmniForm records when a check box is "on," or selected. The value is exported along with other information during export. It can also be used in calculations. Grouped check boxes must have unique on-values. You can let OmniForm create a unique on-value for each new check box added to a group.

5 Select or enter an option in the *Off-Value* pop-up menu.

The off-value is stored in the database when the check box is deselected. This is the value OmniForm records when a check box is "off," or deselected. It is exported along with other information during export. It can also be used in calculations. This option is not available for grouped check boxes.

Set Filling Options

1 Click the *Filling* tab.

2 Select a mark for the check box: an **X**, a check mark, or a fill.

3 Deselect *Can Be Filled* so an empty field cannot be filled and a filled field cannot be changed in Fill View.

4 Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key.

Deselect *Tab Stop* so that the cursor tabs past the selected field.

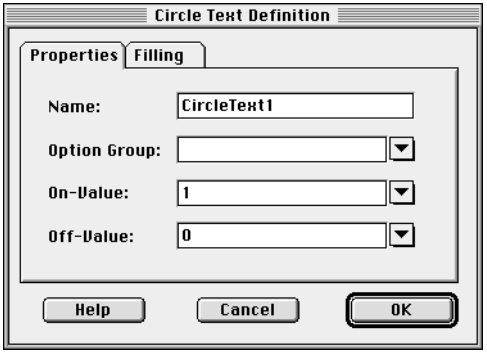
5 Select *Help Message* to type a message that appears in the status bar in Fill View when the cursor is in that field.

See page 6-20 for an example of a help message.

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

Defining a Circle Text Object

Choose *Object Definition...* in the Format menu to open the Circle Text Definition dialog box when a fill circle object is selected.

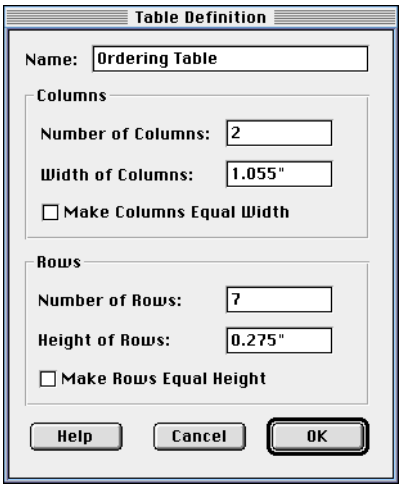


This dialog box has the same options as the Check Box Definition dialog box. See "Defining a Check Box Object" on page 6-24 for information.

Defining a Table Object

Choose *Object Definition...* in the Format menu to open the Table Definition dialog box when a table object is selected.

1 Type a unique name in the *Name* text box.



Each object must have a unique name. A descriptive name such as *Order Information* makes a field easy to find when sorting, searching, changing tab order, and so forth.

2 Type the number of columns you want in the table in the *Number of Columns* text box.

3 Set column width:

- Type the column width in the *Width of Columns* text box.
- Select *Make Columns Equal Width* to resize all columns to the same width.

  OmniForm resizes columns to an equal width without changing table size. If you had two columns, one four centimeters wide and the other two centimeters wide, for example, each would be resized to three centimeters wide.

4 Type the number of rows you want in the table in the *Number of Rows* text box.

5 Set row height:

- Type the row height in the *Height of Rows* text box.
- Select *Make Rows Equal Height* to resize all rows to the same height.

  OmniForm resizes rows to an equal height without changing table size. If you had two rows, one four centimeters high and the other two centimeters high, for example, each would be resized to three centimeters high.

6 Click *OK* to apply the changes.

Defining a Table Cell

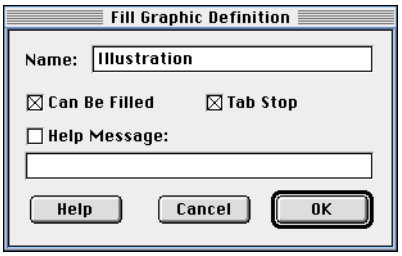
A table cell contains a fill text object by default. See "Defining a Fill Text Object" on page 6-17 for information. See any relevant entry in this section if the table cell contains another type of object.

A table cell can contain more than one object. It can also contain graphics. See "Placing Objects in Table Cells" on page 6-42 for information.

Defining a Fill Graphic Object

Choose *Object Definition...* in the Format menu to open the Fill Graphic Definition dialog box when a fill graphic object is selected.

1 Type a unique name in the *Name* text box.



Each object must have a unique name. A descriptive name such as *Logo* makes a fill graphic field easy to find when importing, exporting, and changing tab order.

2 Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key. Deselect *Tab Stop* so that the cursor tabs past the selected field.

3 Select *Help Message* to type a message that appears in the status bar in Fill View when the cursor is in that field.

See page 6-20 for an example of a help message.

4 Click *OK* to apply the changes.

Changing Object Appearance

This section describes the options in the Object Appearance dialog box and how they affect a selected object. See the section "Creating Objects" on page 6-6 to learn how to create objects.

To change object appearance:

1 Select an object or objects in Design View.

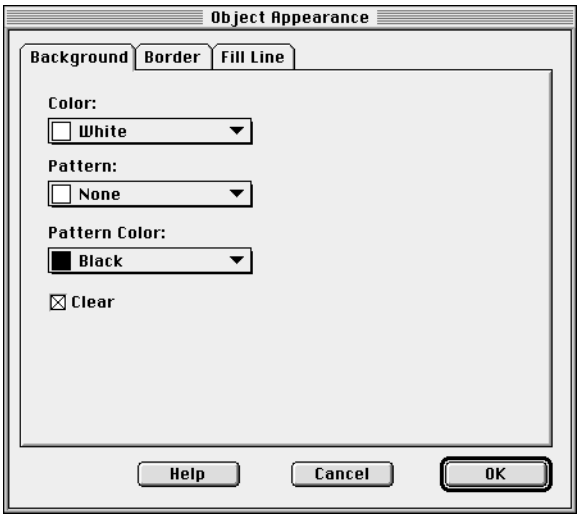
2 Click the Object Appearance button in the standard toolbar or choose *Object Appearance...* in the Format menu.

As a handy shortcut, Control-click on the selected object to open a shortcut menu. Choose *Object Appearance...* in this menu.

The Object Appearance dialog box appears. The next three sections describe *Background, Border,* and *Fill Line* options. Available options depend on the selected object.

Set the Background

1 Click the *Background* tab.



2 Select a background color for the object in the *Color* pop-up menu.

3 Select a background pattern for the object in the *Pattern* pop-up menu.

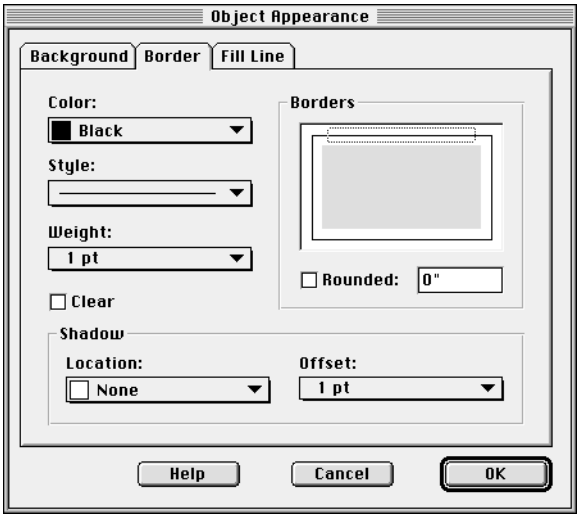
4 Select a color for the background pattern in the *Pattern Color* pop-up menu.

5 Deselect *Clear* to have the selected colors and pattern appear as the object's background.

See "Paint Order" on page 6-32 for a description of how paint order affects color and pattern display.

Set the Border

1 Click the *Border* tab.



2 Select border color in the *Color* pop-up menu.

3 Select a line style in the *Style* pop-up menu.

4 Select border thickness in the *Weight* pop-up menu.

5 Select *Clear* to hide the border and display any paint layers beneath it.

See"Paint Order" on page 6-32 for an explanation of how paint order affects border display.

6 Click each side of the rectangle in the *Borders* section to select where borders appear on the object.

7 Select *Rounded* to round the corners of the border.

To round or square individual corners, click the corners of the rectangle after selecting *Rounded.*

8 Enter a measurement from `0` to `14` in the *Rounded* text box to indicate the degree of border curve.

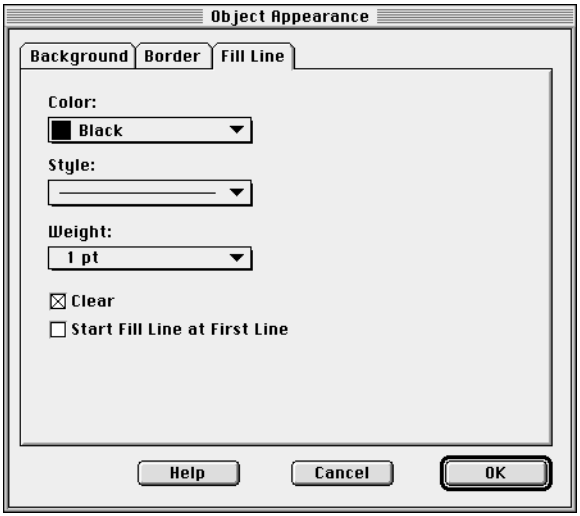
9 For a shadow effect, select an option in the *Location* pop-up menu in the *Shadow* section.

10 Select how many points to offset the shadow from the border in the *Offset* pop-up menu.

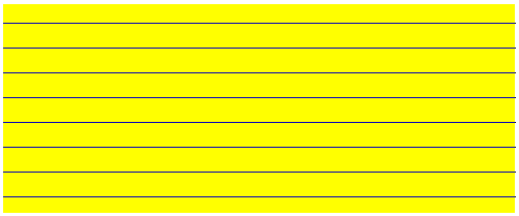
Set Fill Lines

Text alignment must be set to *Left* and *Top* or *Exactly* in the Text dialog box before fill lines can be set. See "Formatting Text" on page 6-35 for information.

1 Click the *Fill Line* tab.



Options in this tab are only active for selected fill text objects. Fill lines appear inside the object much as lines appear on writing paper.



2 Select a color for the fill lines in the *Color* pop-up menu.

3 Select a line style in the *Style* pop-up menu.

4 Select line thickness in the *Weight* pop-up menu.

5 Deselect *Clear* to display the fill lines.

The next section, "Paint Order," describes how paint order affects fill line display.

6 Select *Start Fill Line at First Line Indentation* to indent the first fill line the same amount as the first line of text entered in the field.

See "The Text... Command" on page 6-36 for more information.

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

Paint Order

OmniForm uses a specific paint order. The table object itself is painted first, then the cells inside the table, and then objects inside the cell. This makes it possible to have three layers of paint. The last layer painted in an object overrides all other layers. Because objects inside a cell are painted last, they will cover up the cells and portions of the table.

If an object's background or border is *Clear,* however, then that part of the object is transparent and an object painted below can show through. You can use the *Send to Back* and *Bring to Front* commands in the Format menu to change paint order.

Redesigning Your Form

This section describes how to redesign a form using the Design View tools and commands. Once you have created objects, you may want to move, resize, or convert them. You may also want to make changes to a newly scanned or imported form.

This section contains the following topics:

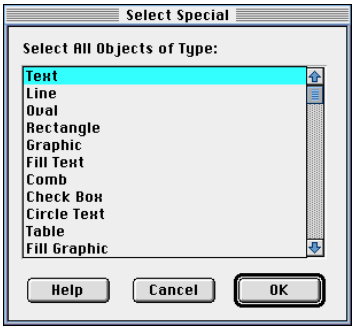
- Selecting an Object
- Moving an Object
- Resizing an Object
- Deleting an Object
- Formatting Text
- Redesigning a Table
- Aligning Objects
- Sending Objects Front or Back
- Changing Tab Order
- Placing Objects in Table Cells
- Converting an Object

Selecting an Object

You can select one or more objects in several ways.

- Click an object to select it.
- Shift-click to select multiple objects.
- Click an object such as a table once to select it, and then click again to select an individual table cell. Do the same to select an individual comb element.
- Hold down the mouse button and drag the cursor around or through all objects to select them.
- Choose *Select All* in the Edit menu to select all objects on a form.

- Choose *Select Special...* in the Edit menu to select all objects of the same type.



Moving an Object

You can move a selected object or objects in several ways.

- Hold down the mouse button and drag the selected object to another location.
- Choose *Size and Position...* in the Format menu to position the selected object precisely on the form.
- Use the *Align* commands in the Format menu or the corresponding button in the Arrange toolbar to align selected objects.
- Use the *Bring to Front* and *Bring to Back* commands in the Format menu or the corresponding buttons in the Arrange toolbar to layer overlapping objects.

Resizing an Object

You can resize a selected object in one of two ways.

Click any handle on the selected object, hold down the mouse button and resize the object as needed.

Hold down the Shift key before clicking a handle to:

- constrain an oval or a fill circle object to a circle shape
- keep a line object straight
- constrain any other object to a square shape

Or, choose *Size and Position...* in the Format menu to enter exact measurements for an object's size.

Deleting an Object

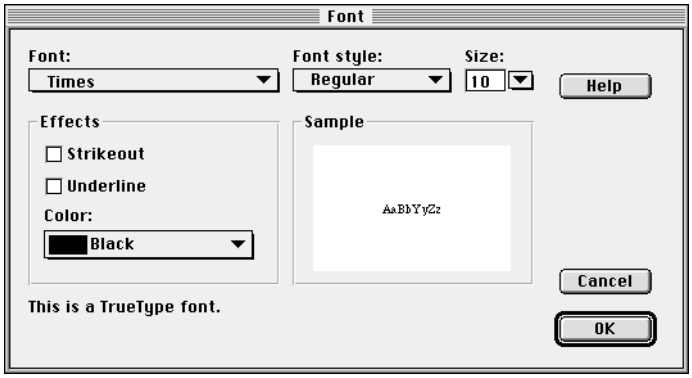
Press the Delete key on your keyboard to delete one or more selected objects.

Formatting Text

Use the *Font...* and *Text...* commands in the Format menu or the corresponding buttons in the font/text toolbar to format selected objects. See "The Font/Text Toolbar" on page 6-4 for information about each button in the toolbar.

The *Font...* Command

1. Select the text and/or fill objects you want to format.
   Text entered in Fill View takes on formatting assigned to fill objects in Design View.
2. Choose *Font...* in the Format menu.
   The Font dialog box appears.



3. Select a font in the *Font* list.
4. Select a style for the selected font in the *Font Style* list.
5. Select a point size for the selected font in the *Size* list.

6 Select an option in the *Effects* box.
- Select *Strikeout* to place a line through all characters.
- Select *Underline* to underline all characters.

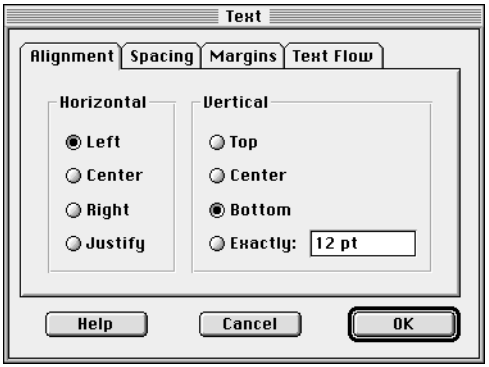
7 Select a color for the selected font by using the *Color* drop-down list.
A preview of your choices appears in the *Sample* box.

8 Click *OK* to apply the formatting.

The *Text...* Command

1 Select the text and/or fill objects you want to format.
Text entered in Fill View takes on formatting assigned to fill objects in Design View.

2 Choose *Text...* in the Format menu.
The Text dialog box appears.



3 Click the *Alignment* tab.

4 Select a horizontal alignment option.
- Click *Left* to align a paragraph to the left.
- Click *Center* to align a paragraph by its horizontal center.
- Click *Right* to align a paragraph to the right.
- Click *Justify* to align a paragraph both right and left.

5 Select a vertical alignment option.
- Click *Top* to align a paragraph to the top of a field.
- Click *Center* to align a paragraph by its vertical center.
- Click *Bottom* to align a paragraph at the bottom of a field.

- Click *Exactly* and enter a point size in the text box to align a paragraph a specific amount from the top of a field.

6 Click the *Spacing* tab and select a line-spacing option.

You can change the vertical spacing between paragraph lines. Vertical spacing is dependent on selected font size; a single-spaced paragraph with 12-point text would have 12 points between each line in the paragraph.

- Select *Single* for a single-spaced paragraph.
- Select *1.5 Lines* for a paragraph with one-and-a-half spaces between each lines.
- Select *Double* for a double-spaced paragraph.
- Select *Exactly* to type in the point size you want between each line in a paragraph.

7 Type a measurement in the *Indentation of First Line in Paragraph* text box if you want to indent the first line of each paragraph.

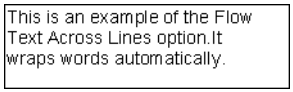
8 Select the *Margins* tab and enter margin measurements in the *Left, Right, Top,* and *Bottom* text boxes.

This measurement is the amount a paragraph will be offset within its *bounding box.* You may want to use margins if you have field borders that would interfere with reading the text.

9 Select the *Text Flow* tab and select how you want text to flow within the set margins of a field.

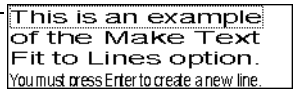
This option is available for text and circle text objects only.

- Select *Flow Text Across Lines* to enter text in a field with automatic word-wrapping.



- Select *Make Text Fit to Lines* to fit text to the size of the line. This can alter the appearance of text.

Each line can be selected separately and resized.



Press Enter to create a new line of text. Each new line can be resized separately from other lines.

OmniForm uses the *Make Text Fit to Lines* option to design forms during scanning and import. Generally, you would want to use the *Flow Text Across Lines* option when formatting text and circle text objects.

Redesigning a Table

Use the *Table AutoFormat...* command to format a selected table.

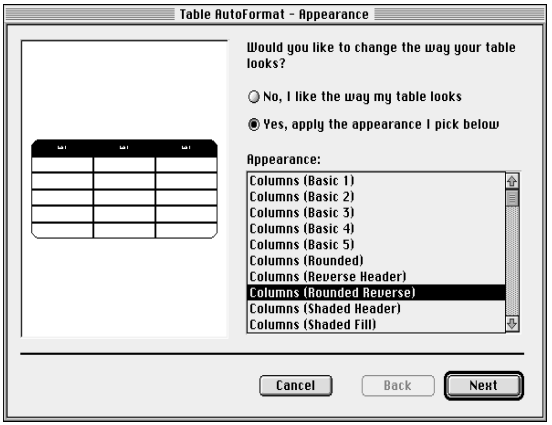
To format a table:

1 Select a table.

2 Choose *Table AutoFormat...* in the Format menu.
The Table AutoFormat dialog box appears.

3 Select the *Yes* option to enable the *Appearance* list box.

4 Select an appearance option for your table.



5 Click *Next>* if it is available to open the *Naming* window.
Depending on your appearance selection, the *Naming* window may not be available. In that case, click *Finish.*

6 Select *Yes, change the column names* if it is available and you want to change the column names.

- Select a column name, click *Rename,* and type in a new name.
- Repeat these steps for each column name to change.

7 Select *Yes, change the row names* if it is available and you want to change the row names.

- Select a row name, click *Rename,* and type in a new name.
- Repeat these steps for each row name to change.

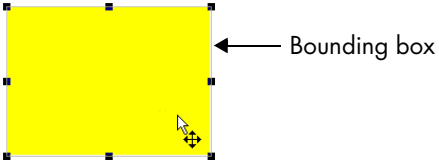
8 Select *Change Header to Match Field Names* if you want the header to have the same name as its corresponding column/row.

9 Click *Finish* to apply the changes to your table.

Aligning Objects

Use the Align commands in the Format menu or the corresponding buttons in the Arrange toolbar to move and align multiple selected objects. See "The Arrange Toolbar" on page 6-4 for information about each button in the toolbar.

Each selected object aligns to the edge of its bounding box, the imaginary box that surrounds all objects. A bounding box appears when you select an object and hold down the mouse button. Objects align to the outermost selected object.



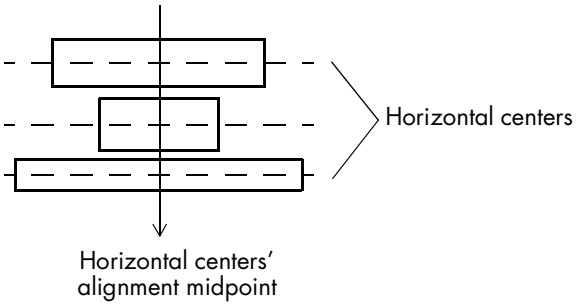
To align objects:

1 Select the objects to align.

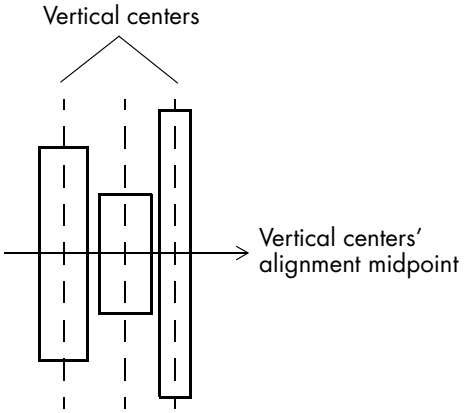
2 Choose *Align* in the Format menu and an alignment command in its cascading menu, or click the appropriate button in the align toolbar.

- Select *Left* to align all selected objects by their left edges.
- Select *Right* to align all selected objects by their right edges.

- Select *Center Horizontally* to align the selected objects by their horizontal centers.



- Select *Top* to align all selected objects by their top edges.
- Select *Bottom* to align all selected objects by their bottom edges.
- Select *Center Vertically* to align the selected objects by their vertical centers.



The objects align according to the chosen command.

Sending Objects Front or Back

You can use the *Bring to Front* or *Send to Back* commands in the Format menu to layer overlapping objects.

Choose *Bring to Front* to move one or more selected objects in front of all objects on a form.

Choose *Send to Back* to move one or more selected objects behind all objects on a form.

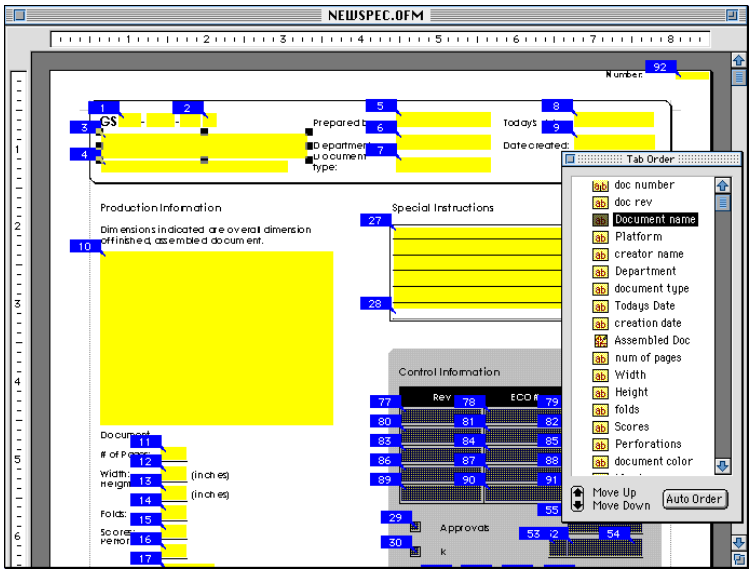
Changing Tab Order

Tab order is the order in which the cursor moves from field to field on a form in Fill View. You may want to change tab order if you have added, deleted, or moved fillable objects in Design View.

To change tab order:

1 Click the Tab Order button in the standard toolbar or choose *Tab Order...* in the Tools menu.

The Tab Order window appears and numbers appear by each object on the form. Both indicate current tab order.



2 Select the field to reorder.

Note that the corresponding object on the form is selected.

3 Reorder the field in one of the following ways:

- Select a field in the window and drag it up or down to change its tab order.
- Click the *Move Up* button to move the selected field up. Click as many times as needed to move it into place.
- Click the *Move Down* button to move the selected field down. Click as many times as needed to move it into place.

- Click *Auto Order* to place all fields in the original creation order on a form designed by OmniForm during scanning or import.

  If you created the form in OmniForm, the program uses "smart" auto ordering. OmniForm generally reorders fields from left to right and top to bottom.

- Click a field with a triangle in front of it to display its list of contained fields.

  A table, for example, opens to display a list of cells. You can click each cell to display the object(s) it contains. You cannot change cell order, but you can change tab order within a cell if it contains multiple fillable fields.

The corresponding tab order numbers on the field change when you reorder a field in the Tab Order dialog box.

4 Repeat for each field you want to reorder.

5 Click the Tab Order button in the standard toolbar or choose *Tab Order...* in the Tools menu to close the Tab Order window.

Placing Objects in Table Cells

Each table cell contains one fill text object by default (except for column headers which contain a text object). A cell can contain more than one object, fillable or non-fillable.

To place objects in a table cell:

1 Select a tool in the drawing toolbar.

2 Move the cursor over the cell to fill so that it highlights.

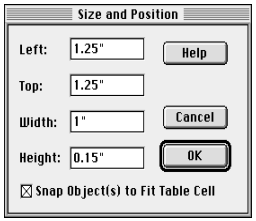
3 Click to place the object in the cell, or hold down the mouse button and draw an object of the size you want.

To resize an object to fit a cell exactly:

1 With the object in the table cell still selected, choose *Size and Position* in the Format menu.

The Size and Position dialog box appears.

2 Select *Snap Object(s) to Fit Table Cell.*



3 Click *OK.*

4 The object resizes to fit the cell exactly.

Converting an Object

You can convert any selected object to another type of object. You might, for example, want to convert objects in table cells to 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.	

Be careful when converting objects in an existing form. If the old object contained information, you will permanently lose that object's information in every record.

You can also convert objects that were not defined properly during import; for example, OmniForm might define a line with space above it as a fill text field. You could convert this to a line.

To convert a selected object:

1 Choose *Convert...* in the Edit menu.
The Convert dialog box appears.

2 Select an object type in the list box and click *OK.*
The object is converted.

Use the *Select Special...* command in the Edit menu to select multiple objects to convert.

Using the Scrap Album

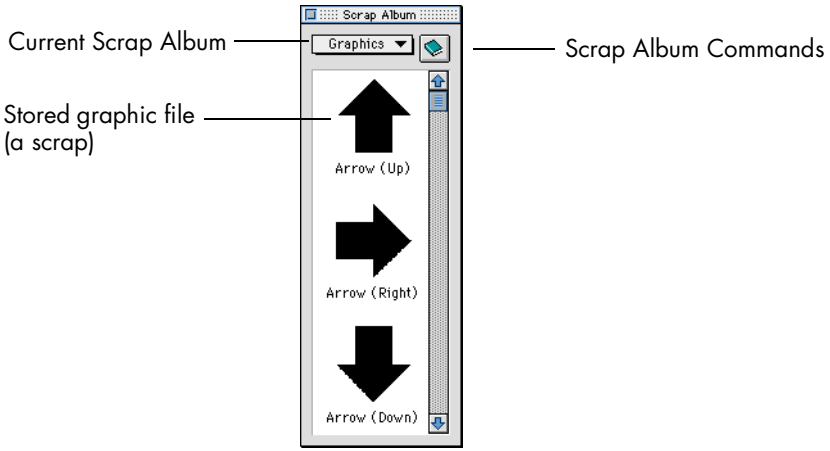
This section describes the OmniForm Scrap Album and how to use it.

What is the Scrap Album?

The Scrap Album is a convenient place to store frequently used or complex objects. Objects stored in Scrap Albums are called *scraps.* You can copy these scraps into any form. You can use one of the several Scrap Album files provided with OmniForm or create your own.

Opening a Scrap Album

1 Choose *Scrap Album* in the Tools menu.
The Scrap Album opens.



2 Select a Scrap Album to view in the *Scrap Album* pop-up menu, or create your own.

See “Creating a New Scrap Album” on page 6-46 for information.

Copying Objects to the Scrap Album

1 Open the desired Scrap Album.

2 Select one or more objects on your form and drag them into the Scrap Album.

Alternatively, select one or more objects and choose *Paste Scrap* in the Scrap Album Commands icon menu.

Small thumbnails of the objects appear as *Scrap 1, Scrap 2,* and so forth in the Scrap Album.

Placing Scraps in a Form

1 Open the desired Scrap Album.

2 Select a scrap and drag it into your form.

Alternatively, select a scrap and choose *Copy Scrap* in the Scrap Album Commands icon menu.

You can only select one scrap at a time. The selected scrap appears as the original object in your form.

Renaming a Scrap

1 Select a scrap.

2 Choose *Rename Scrap* in the Scrap Album Commands icon menu.

3 Type a new name for the scrap and press Enter to accept the name.

Press the esc key to cancel the command and leave the name as it is.

Deleting a Scrap

1 Select a scrap.

2 Select *Delete Scrap* in the Scrap Album Commands icon menu.
You can also press the Delete key to delete a selected scrap. OmniForm prompts you to confirm your choice.

You cannot undo the *Delete Scrap* command!

Creating a New Scrap Album

1 Select *New Scrap Album...* in the Scrap Album icon pop-up menu.
The New Scrap Album dialog box appears.

2 Type a name in the *Scrap Album Name* text box.

3 Click *OK.*
A new, empty Scrap Album appears.

Renaming a Scrap Album

1 Open the Scrap Album to rename.

2 Choose *Rename Scrap Album...* in the Scrap Album Commands icon menu.

3 The Rename Scrap Album dialog box appears.

4 Type a name in the *New Name* text box.

5 Click *OK*.
The new Scrap Album name appears in the *Scrap Album* pop-up menu.

Deleting a Scrap Album

1 Open the Scrap Album to delete.

2 Choose *Delete Scrap Album* in the Scrap Album Commands icon menu.

3 OmniForm prompts you to confirm your choice.

You cannot undo the *Delete Scrap Album* command!

You can also delete a Scrap Album file directly from the hard drive. Scrap Album files are stored in `Scrap Album` folder in the `OmniForm` folder. Always close OmniForm before deleting any OmniForm files from the hard drive.

Changing the Scrap Album View

1 Choose *View* in the Scrap Album Commands icon menu.

2 Select a view in its cascading menu.

- Choose *Icons* to view the scraps as thumbnails of the stored objects.
- Choose *List* to view the scraps as a list.

Scraps are listed in creation order in both *Icon* and *List* views.

Chapter 7

Filling a Form

This chapter describes what kinds of fields a form can contain, how to fill those fields, how to move through fields on a form, and how to use the standard toolbar.

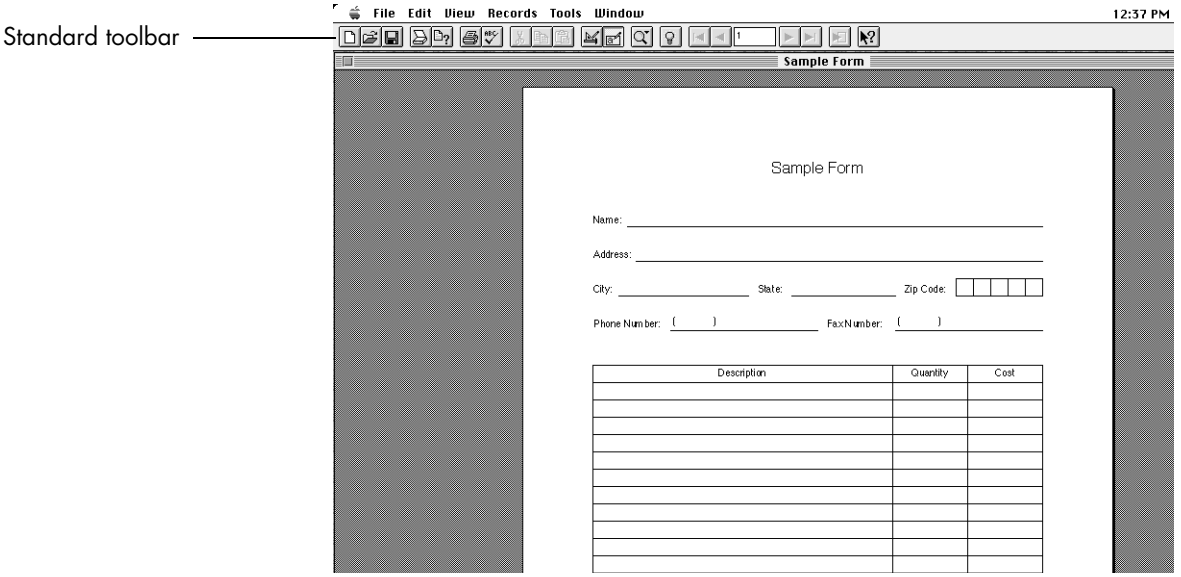
See Chapter 5, OmniForm Procedures, if you need information on how to start working with a form. You must first open, scan, or import a form in order to fill it.

This chapter contains the following sections:

- The Fill View Window
- Filling Fields
- Spell Checking
- Moving Through Fields
- Saving in Fill View

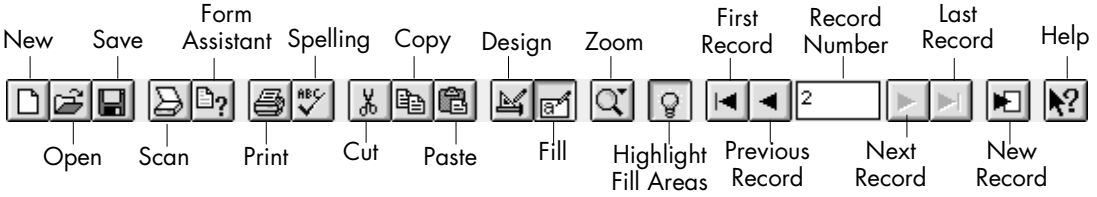
The Fill View Window

This section describes the standard toolbar and its commands. The standard toolbar is the only toolbar in Fill View. It is somewhat different than the standard toolbar in Design View.



The Standard Toolbar

Use the standard toolbar for basic file operations such as saving and printing. Use it also to move through records in a database.



All these buttons correspond to menu commands of the same name. Clicking a button is the same as choosing its corresponding menu command.

Click the Help button and click on any toolbar button to see its function.

Filling Fields

This section describes each type of fillable field in OmniForm, how to fill it, and how to check spelling. It contains the following topics:

- Fill Text
- Comb
- Check Box
- Circle Text
- Table
- Fill Graphic
- List Fields
- Fields Defined by a Calculation
- Field Validation

These instructions assume that the cursor is already in a field.

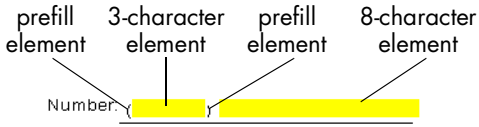
The way information is displayed in a field depends on the current form language selection and object definition. See "International Settings" on page 5-22 and "Defining Objects" on page 6-16 for detailed information.

Fill Text

Enter characters in a fill text field: letters, numbers, symbols, dates, and so forth. Fill text fields can contain any sort of textual information.

Comb

Enter characters in a comb field: letters, numbers, or symbols appropriate to the field. Phone numbers and zip codes are commonly used comb fields. A comb field consists of individual comb *elements.* Each element can contain a different number of characters.

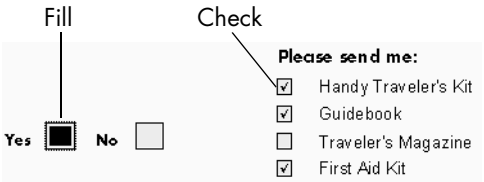


You do not have to tab from element to element in a comb field. Just type the required amount of information and OmniForm automatically moves the cursor to the next element as appropriate.

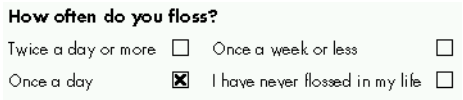
Check Box

Click a check box field to fill it. A check box field can be defined to contain one of three elements: a check mark, an **X**, or a fill. If OmniForm designs your form and recognizes a check box, it defines the box to contain an **X** by default.

Check boxes are commonly used for *Yes/No* questions and for selecting an item in a group, as in the two examples below:

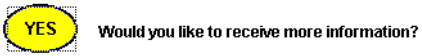


Check boxes may be *grouped;* this means that only one can be selected. Selecting one check box automatically deselects another checked box in the group as in the example below.



Circle Text

Click a circle text field to fill it. A border appears around the filled field. A circle text field can contain text and other characters, or it can function much like a check box (see "Check Box," above).



Table

A table field consists of individual *cells*. Table cells are fill text fields by default. Enter characters in these cells just as you would in fill text fields.

A table cell can also contain any other type of field, even multiple fields of the same or different types. In the example below, the table cells on the right contain check box fields.

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.	

The user clicks this cell to fill it in the same way as a check box field. See Chapter 6, Designing a Form, for more information on tables.

Fill Graphic

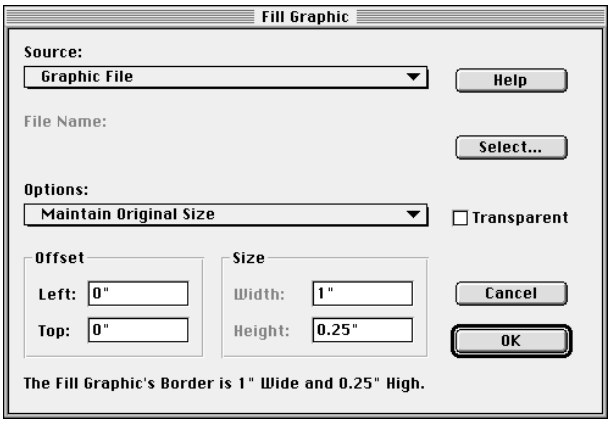
This section describes both how to import a graphic into a fill graphic field and how to delete a graphic in a fill graphic field.

To import an existing graphic:

1 Click the fill graphic field or tab to the field and press the Space bar.

The *Fill Graphic* dialog box appears.

2 Select *Graphic File* in the *Source* pop-up menu.



3 Enter a file name.

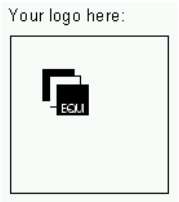
- Click Select if you need to locate a file.

- Select a file format in the *Files of Type* pop-up menu.
- Select a file and click *Open* to return to the Fill Graphic dialog box.

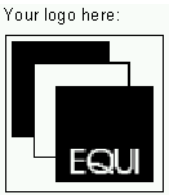
  The file name appears in the *File Name* text box.

4 Select an option in the *Options* pop-up menu.

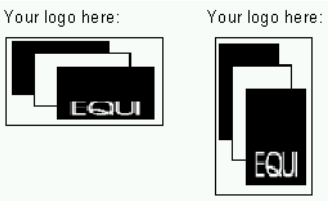
- Select *Maintain Original Size* to import the graphic without changes.



- Select *Scale Proportionally* to fit the graphic in the fill graphic field while keeping its exact proportions.



- Select *Stretch to Fit* to change your graphic's original shape and size to fit in the fill graphic field.



  Depending on the shape of the fill graphic field, your graphic may be stretched or compressed. You might want to use this for special effects.

- Select *Specify Width & Height* to specify the graphic's size. Enter measurements for your graphic in the *Width* and *Height* text boxes under *Size.* The size of the fill graphic field is displayed at the bottom of the Fill Graphic dialog box.

If you enter a size larger than the fill graphic field, only part of the graphic will be visible.

5 Enter offset measurements under *Offset* if you want.

This is useful if you want to position a graphic exactly in the field, crop a large graphic, or move the graphic away from a field border that would interfere with its design.

- Enter a number in *Left* to specify how far from the left side of the field to place the graphic.
- Enter a number in *Top* to specify how far from the top of the field to place the graphic.

6 Select or deselect *Transparent.*

- Select *Transparent* if you want to be able to see information behind the graphic.

  Whether a graphic prints transparently depends on your printer driver. See your printer documentation for information.
- Deselect *Transparent* if you want the graphic to be opaque. You will not be able to see information behind the graphic.

7 Click *OK.*

OmniForm imports the graphic and displays it in the fill graphic field.

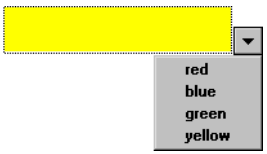
To delete an existing graphic:

Select *None* in the *Source* pop-up menu and click *OK* to delete an existing graphic from a fill graphic field.

List Fields

Fields can contain a list of selectable entries. A pop-up menu arrow appears when the cursor is in the field.

Click the arrow to open the list

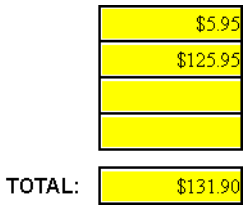


Select an entry. The entry appears in the field.

Fields Defined by a Calculation

The only time you would notice a calculation in Fill View is when a field fills in automatically.

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



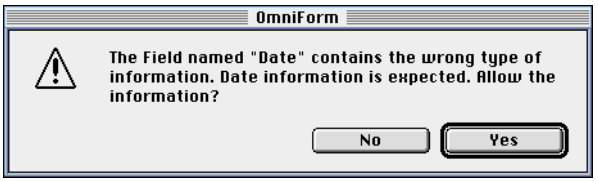
You define a calculation on a field in Design View. See Chapter 9, Using Calculations, for detailed information on calculations.

Field Validation

Fill text fields can be configured by the creator to:

- Require that you enter information in a field and do not leave it blank.
- Require that you enter specific information in a field.
- Require both of the above.

This is *field validation* and ensures that information entered in a form is consistent. For example, you may be required to enter a date in a validated *Date* field. You would receive a reminder prompt from OmniForm if you attempted to enter anything other than a date.



- Click *No* to return to the field and enter the expected information.
- Click *Yes* to override field validation.

See “Set Validation Options” on page 6-20 for detailed information on field validation.

Spell Checking

Use the spell-checking feature to verify that field entries are correct.

Before you check spelling make sure you have selected the correct language for your form in the Options dialog box as described below.

Proceed to "Spell Checking Your Form" on page 7-11 if: you have a single-language form; the *Current Form* language selection is correct; you have a dictionary for that language.

Checking the *Current Form* Language Selection

1 Choose *Preferences...* in the Tools menu.
The Preferences dialog box appears.

2 Click the *International* tab.

3 Click *Current Form.*
You cannot change the *Language* selection for the current form in Fill View.

4 Click *Cancel* and proceed to "Changing the Language Selection" on page 7-10 if the language selection for *Current Form* is incorrect.

5 Click *OK* if the language is correct.

Changing the Language Selection

1. Click the Design button in the standard toolbar or choose *Design* in the View menu.
2. Choose *Preferences...* in the Tools menu.
   The Preferences dialog box appears.
3. Click the *International* tab if it is not displayed.
4. Select the correct language for your form in the *Current Form* pop-up menu.
   This also selects the correct dictionary for spell checking.
5. Click *OK*.

6. Click the Fill View button in the standard toolbar or choose *Fill* in the View menu.
7. Proceed with the spell check as described in "Spell Checking Your Form" on page 7-11.

See "International Settings" on page 5-22 for more information.

Multiple Languages

You may have scanned in a form with the *Allow Multiple Languages* option selected (see "The Allow Multiple Languages Option" on page 5-25). You have two choices for effective spell checking:

- Decide which language makes up the majority of your form and select that language as the *Current Form* selection.
  This is faster but less accurate.
- Spell check only the portion of the form that the *Current Form* selection matches. Change the *Current Form* selection to match another portion of the form, spell check that portion, and so on for each language in the form.
  This is more time-consuming but more accurate. Remember that changing the *Current Form* selection could cause OmniForm to reformat data already entered in Fill View.

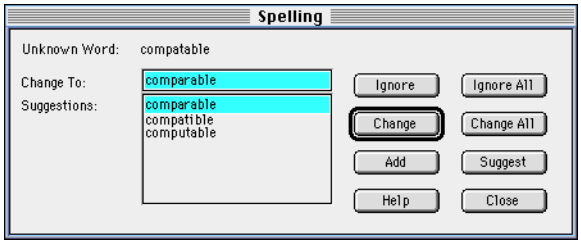
Dictionaries

Dictionaries for all supported languages are included in the International English version of OmniForm. The United States version has a standard English dictionary. In the U.S., you can call 800-654-1187 to order additional dictionaries. You must have a dictionary that matches the language of a form to spell check it.

Spell Checking Your Form

1 Click the Spelling button in the standard toolbar, choose *Check Spelling...* in the Tools menu, or use the Command= shortcut.

The Spelling dialog box appears with the first questionable word after *Unknown 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 Select one of the following options:

- Click *Ignore* to allow the questioned word to remain as is and continue the spell check.
- Click *Ignore All* to ignore all instances of the questioned word in the form and continue the spell check.
- Change the word in the *Change to* text box.

  You can retype this word or select a word in the *Suggestions* list to place it in the *Change to* text box.
- Click *Change* to accept the spelling in the *Change to* text box and continue the spell check.
- Click *Change All* to accept the spelling in the *Change to* text box, change all instances of the questioned word in the form, and continue the spell check.
- Click *Add* to add the word to the user dictionary and continue the spell check. The added word will not be questioned again in the current form or in any other form.
- Click *Suggest* to place the first word in the *Suggestions* list box in the *Change to* text box. The list of suggestions may change to offer a list of the closest matches to that word.
- Click *Close* to end the spell check.

3 Click *OK* in the dialog box that tells you the spell check is done.

Moving Through Fields

You can click in any field to place the cursor there or you can use the following keyboard commands to move the cursor within a form.

Action	Key Combination
Place the cursor in a field	When a form first opens, press the Tab key to place the cursor in the first field.
Next field	Press the Tab key.
Previous field	Press Shift-Tab.
Next line in a fill text field	Press Return to create a new line in a multiple-line fill text field.
End of a line in a fill text field	Press Command-right arrow.
Beginning of a line in a fill text field	Press Command-left arrow.
End of text in a fill text field	Press Option-down arrow.
Beginning of text in a fill text field	Press Option-up arrow.
Next word in a field	Press Option-right arrow.
Previous word in a field	Press Option-left arrow.
Next page in a form	Press Option-page up.
Previous page in a form	Press Option-page down.
First page in a form	Press Option-home.
Last page in a form	Press Option-end.

Saving in Fill View

If you close a form after making data entries in Fill View (but no changes in Design View) OmniForm does not prompt you to save the changes. This is because OmniForm saves automatically in Fill View.

OmniForm saves after numerous user actions: moving from one record to another, printing or closing a form, before importing or exporting data, and in many other situations. You would rarely need to use the *Save* command in Fill View except to:

- Save changes to the entire form, both changes made in Design View and data entered in Fill View.
- Save information entered in the *Print offsets for data* option in the Print dialog box.

Use the *Save As...* command in Fill View to save a form to another location or with a different file name.

Chapter 8

Managing an OmniForm Database

This chapter introduces basic database concepts. It explains what a database is, how to create one automatically by scanning or importing a form, how to create and maintain records in a database, and how to protect the vital information entered in your database records.

This chapter contains the following sections:

- What is a Database?
- Managing Database Records
- Protecting Your Database

See Chapter 6, Designing a Form, for detailed information on defining fields in a form so that all your records contain the proper information.

See Chapter 9, Using Calculations, for detailed information on using calculations. Calculations automate data entry and reduce potential user errors.

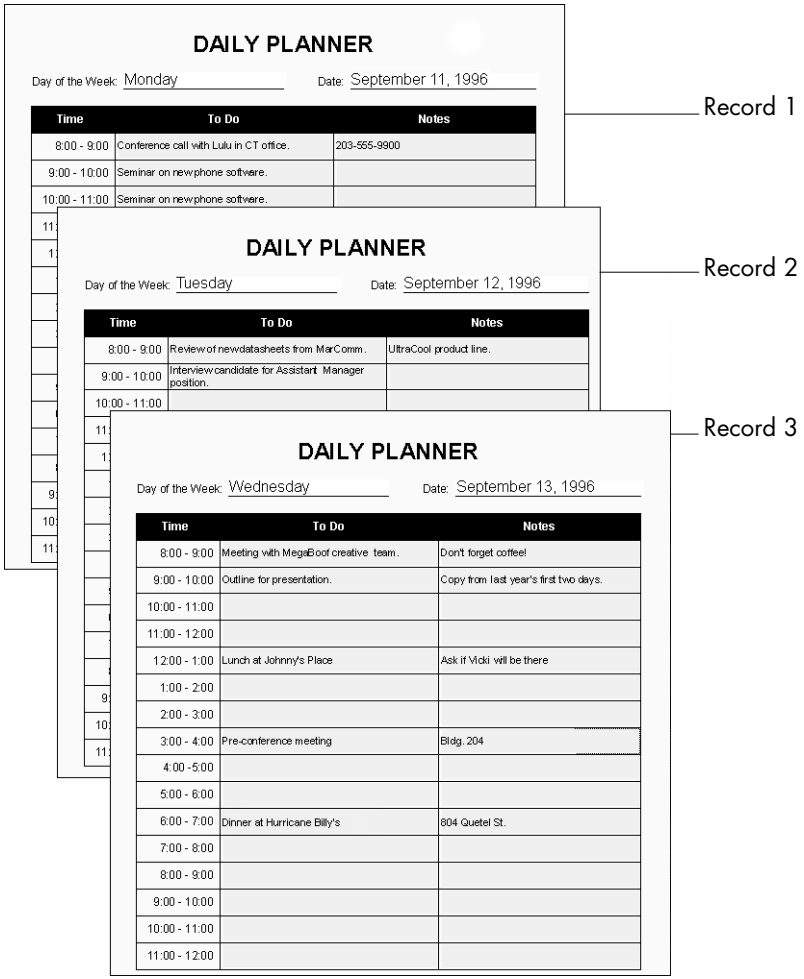
What is a Database?

A database is a collection (file) of information stored as individual *records.* Each record uses the same form design but can contain different information in its fields.

OmniForm automatically creates a database when you scan in or import a form. As soon as you fill in the form, it becomes the first record in a new database. Any user of this database can create a new, blank form using the record as a template and then fill in new information to create another record. This makes it possible to store a large amount of similar information and retrieve it quickly and easily.

The user who designed this daily planner created a new record each day. So far, this user has a database containing three records.

The user can sort these records by date or other entries and search for information in any field.



Managing Database Records

This section tells you how to create a database of records and manage its information. It contains the following topics:

- Creating New Records
- Duplicating Records
- Moving Through a Database
- Searching Records for Information
- Sorting Records
- Recalculating Records
- Deleting Records
- Exporting Information
- Exported Data and Shared Forms
- Importing Information

The form you open or scan becomes the first record of a new database once you fill in a field. You can then create new records with the same layout and fields and fill them with different information.

For step-by-step instructions on creating a database and performing basic functions, see "Tutorial 4 — The OmniForm Database" on page 3-46.

Creating New Records

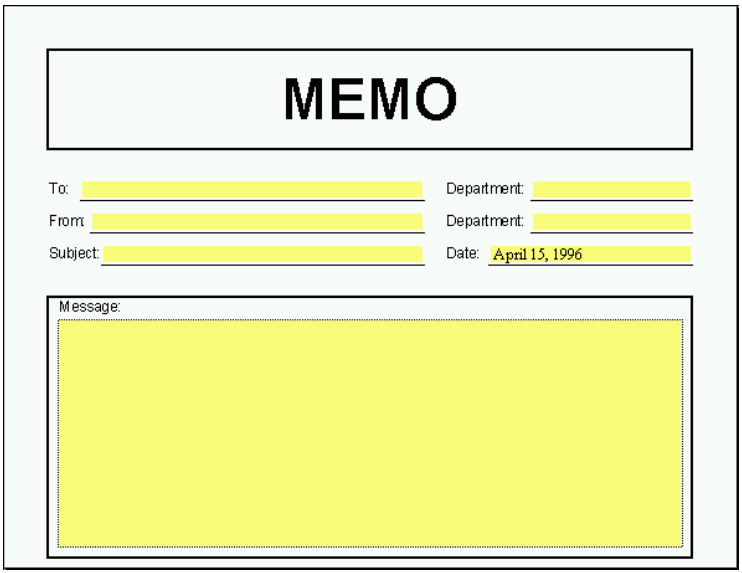
As long as you have a form open and fill at least one field in the current record, you can create new records.

You cannot create a new record if data protection is turned on. See "Protecting Your Database" on page 8-26 for information.

To create a new record:

1 Open or scan in a form.

2 If the form opens in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.



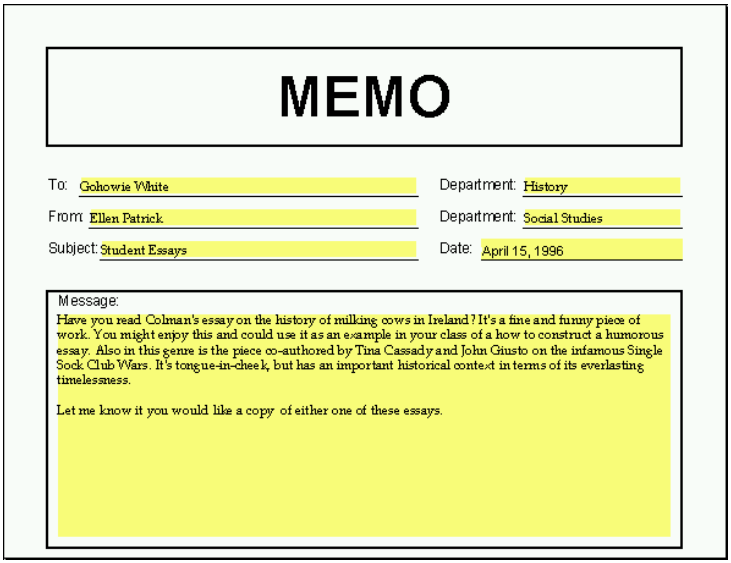
3 Click in a field with the cursor or press Tab to place the cursor in the first fillable field.

4 Enter information in the field.

OmniForm cannot create a new record until you fill at least one field in an empty form. A form with fields filled only by automatic calculations (such as a date field) is still considered empty by OmniForm. You must fill at least one field manually before you can create a new record.

5 Press Tab to move to the next field.
Because a field is filled, you now have a database with one record in it.

6 Fill in as many fields as you like.



7 Click the New button in the standard toolbar or choose *Go To* in the Records menu and *New* in its cascading menu.

OmniForm creates and displays a new, empty record with the same form design as the first one.

8 Fill in this record with the appropriate information.

9 Continue to create new records in this way as you need.

Duplicating Records

You can duplicate any record in a database as long as it has information entered in at least one field. This is useful if you want to create records that will contain much of the same information.

A form with fields filled only by automatic calculations (such as a date field) is still considered empty by OmniForm. You must fill at least one field manually before you can create a new record.

You cannot duplicate a record if data protection is turned on. See "Protecting Your Database" on page 8-26 for information.

To duplicate a record:

1 Open or scan in a form.

2 If the form opens in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

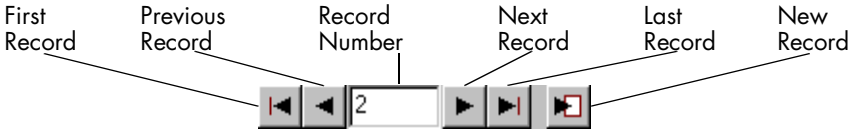
3 Fill in the information you want duplicated.

4 Choose *Duplicate Record* in the Records menu.
OmniForm duplicates and displays the new record.

To change an entry in a filled field, tab to a field or drag your cursor over the entry to highlight it and then type a new entry.

Moving Through a Database

Once you have multiple records, use the Record buttons in the standard toolbar or the commands in the Records menu to move through a database.



First Record

Click the First Record button or choose *Go To* in the Records menu and *First* in its cascading menu to move to the first record in your database.

Previous Record

Click the Previous Record button or choose *Go To* in the Records menu and *Previous* in its cascading menu to move to the record before the one you are viewing. If you are viewing record 3, for example, the previous record is record 2.

Record Number

The Record Number text box displays the number of the current record. Follow these steps to move to another record:

1 Highlight the number in the Record Number text box.

2 Type a new number.

3 Press Return to move to that record.

Next Record

Click the Next Record button or choose *Go To* in the Records menu and *Next* in its cascading menu to move to the record after the one you are viewing. If you are viewing record 3, for example, the next record is record 4.

Last Record

Click the Last Record button or choose *Go To* in the Records menu and *Last* in its cascading menu to move to the last record in your database.

New Record

Click the New Record button or choose *Go To* in the Records menu and *New* in its cascading menu to create and move to a new record.

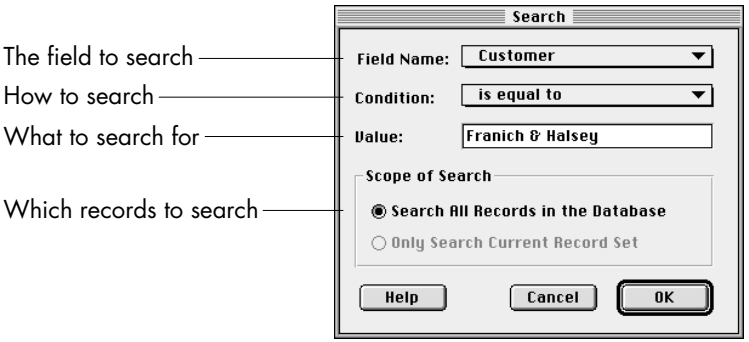
Searching Records for Information

A database can contain a tremendous amount of information. If you had to search manually through hundreds of records in your database to find a particular record, it could take hours. An OmniForm search, however, can retrieve records with the information you need in seconds.

These retrieved records are called a *found set*. You can print, fax, or export the found set if you wish.

To search for information:

1. If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.
2. Choose *Search...* in the Records menu.
   The Search dialog box appears.



3 Select a field name in the *Field Name* pop-up menu.

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

To simplify searches, give each field a unique name. Otherwise, you will have fields named *FillText1*, *FillText2,* and so forth, making it difficult to determine which fields contain what information. See "Defining Objects" on page 6-16 for detailed information.

4 Select a condition in the *Condition* pop-up menu.

A condition describes how to look for information entered in the *Value* text box. For example, suppose you entered the words `Franich & Halsey` in the *Value* text box.

The following bulleted items show the results of a search using each available condition option. Proceed to step 5 on page 8-10 if you already know which condition to select.

- *is equal to:* find an exact match of the *Value* entry.

  This finds records that have *Franich & Halsey* and nothing else in the *Customer* field.

Customer:
Franich & Halsey

- *is not equal to:* find anything but the *Value* entry.

  This finds records that have anything but *Franich & Halsey* in the *Customer* field.

Customer:
Estimated Prophet, Inc.

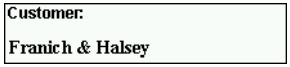
- *is greater than:* find records of greater value than the *Value* entry.

  This finds records that have entries in the *Customer* field later in the alphabet than the entry, for example, *Franklin* or *Gallatron, Inc*.

Customer:
Gallatron, Inc.

- *is greater than or equal to:* find records of equal or greater value than the *Value* entry.

  This search finds records that have entries in the *Customer* field beginning with the entry name itself up to the letter *Z*.

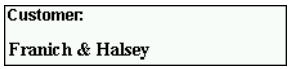
- *is less than:* find records of lesser value than the *Value* entry.

  This finds records that have entries in the *Customer* field beginning with a symbol, a number, or letters earlier in the alphabet than the entry, for example, *France* or *Dharma Dogs*.

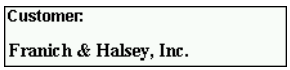
- *is less than or equal to:* find records of equal or lesser value than the *Value* entry.

  This finds records that have entries in the *Customer* field beginning with a symbol, a number, or the letter *A* up to the entry name itself.

- *begins with:* find records that begin with the *Value* entry.

  This search finds records that have *Franich & Halsey* as the entry or at the beginning of an entry in the *Customer* field.

- *does not begin with:* find records that do not begin with the *Value* entry or that do not contain the value entry at all.

  This search finds records that do not have *Franich & Halsey* as the beginning of the entry in the *Customer* field or records that do not contain *Franich & Halsey* at all.

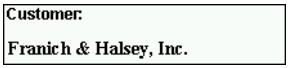
- *ends with:* find records that have the *Value* entry at the end of the selected field.

  This search finds records that have *Franich & Halsey* as the entry or at the end of an entry in the *Customer* field.

- *does not end with:* find records that do not have the *Value* entry at the end of the selected field or records that do not contain the value entry at all.

  This search finds records that do not have *Franich & Halsey* at the end of an entry in the *Customer* field.

- *contains:* find records that contain the *Value* entry.

  This search finds records that have *Franich & Halsey* entered anywhere in the *Customer* field.

- *does not contain:* find records that do not contain the *Value* entry.

  This search finds records that do not have *Franich & Halsey* entered anywhere in the *Customer* field.

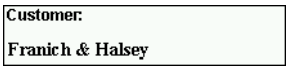
- *is empty:* find records that have no entry in the selected field.

  The *Value* text box is disabled if this is selected.

- *is not empty:* find records that have an entry of any sort in the selected field.

  The *Value* text box is disabled if this is selected.

5 Type the text to find in the *Value* text box.

Information is not case-sensitive. Typing `Los Gatos` is the same as typing `los gatos`.

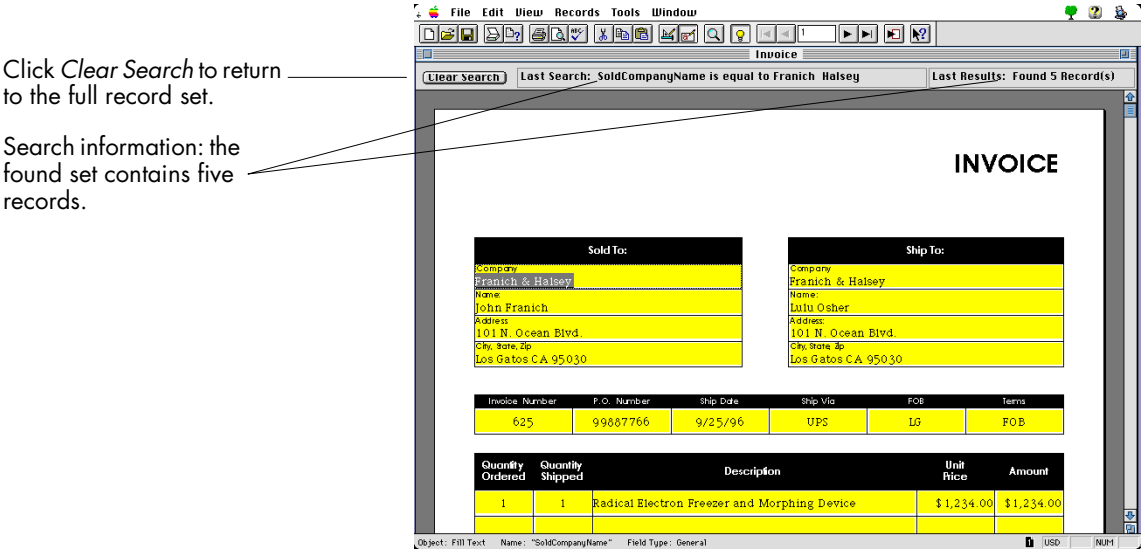
How OmniForm searches for the information in the *Value* text box depends on the selection in the *Condition* pop-up menu as described in the previous step.

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 that is open from a previous search.

7 Click *OK.*

OmniForm searches for and retrieves all records that contain the information you specified in the Search dialog box.



Under the standard toolbar, OmniForm displays the search information and number of records in the found set. If you need to narrow the search further, choose *Search...* again.

You might, for example, want to search the Franich & Halsey record set for invoices from a specific month. 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 search.

8 Click *Clear Search* under the standard toolbar to return to the full record set when you are done.

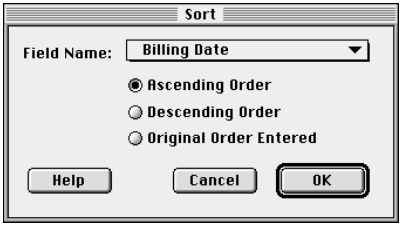
Sorting Records

You can sort records in OmniForm in ascending, descending, or original order entry. This is useful for many situations. If you wanted to export mailing information, for example, you could sort records by postal code to reduce bulk mailing costs, or invoices by date to find the most delinquent accounts.

To sort records:

1 If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

2 Choose *Sort...* in the Records menu.
The Sort dialog box appears.



3 Select the field by which to sort in the *Field Name* pop-up menu.
All the fields in your form are listed here.

To make sorting as easy as possible, give each field a unique name after it is created. Otherwise, you could have fields named *FillText1*, *FillText2*, and so forth, making it difficult to figure out which fields contain what information. See "Defining Objects" on page 6-16 for detailed information.

4 Select a sort order.

- Select *Ascending Order* to sort records from least to greatest; for example, from A–Z or from 0–100. Symbols precede numbers which 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 which precede symbols: Forty, 40, $40.
- Select *Original Order Entered* to sort records in the order in which you originally entered information in the selected field. This is useful to view the history of information entered.

5 Click *OK*.
OmniForm sorts the records in the order indicated.

Recalculating Records

Recalculating records applies any new or changed calculations to selected records in a database. Until you use the *Recalculate...* command, new or changed calculations apply only to new records.

See Chapter 9, Using Calculations, for detailed information on creating calculations.

This command reapplies *all* existing calculations to the selected records. You may not always want this to happen.

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 do not want older records to use the new calculation because the original rate was correct at the time.

If you recalculated all records after adding the new calculation to the expense form, the mileage rates on your old records would also change. They would then be incorrect. To prevent this, you could search the records for those records newer than the date you changed the mileage calculation, and apply the new calculation only to the newer records.

See "Searching Records for Information" on page 8-7 for information on searching.

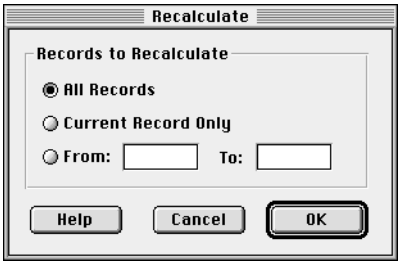
You cannot recalculate records if data protection is turned on. See "Protecting Your Database" on page 8-26 for information.

To recalculate records:

1 If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

2 Choose *Recalculate...* in the Records menu.

The Recalculate dialog box appears.



3 Select the records to recalculate.

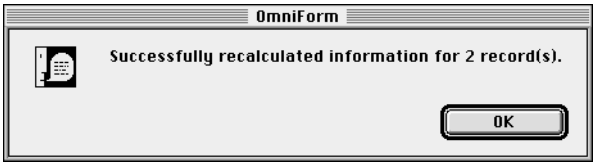
- Select *All Records* to apply the new or changed calculation to either the current found set or to every record in the database if the entire record set is open.
- Select *Current Record Only* to apply the new or changed calculation to just the record you are viewing.
- Select *From/To* to apply the new or changed calculation to a range of records.

  Enter a number in the *From* and *To* text boxes. If you entered `1` in the *From* text box and `5` in the *To* text box, for example, OmniForm would recalculate the first five records in your database or found set.

4 Click *OK*.

OmniForm recalculates the records according to your specifications.

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



You cannot undo a recalculation!

Deleting Records

This section describes how to delete one or more records in a database. Do this to get rid of old, unwanted, or duplicate records.

You can export information from a record first if you want to delete a record but save its data. See "Exporting Information" on page 8-16 for instructions.

You cannot delete a record if data protection is turned on. See "Protecting Your Database" on page 8-26 for information.

To delete the current record:

1. If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.
2. Choose *Delete Record* in the Records menu.
   A warning dialog box appears.
3. Click *Yes* to delete the current record permanently.

You cannot undo a record deletion!

To delete all records:

1. If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.
2. To delete a found set of records instead of all records, click *Search...* in the Records menu to find the records to delete.
   See "Searching Records for Information" on page 8-7 for more information.
3. Choose *Delete All Records* in the Records menu.
   A warning dialog box appears.
4. Click *Yes* to delete all records or the found set permanently.

You cannot undo a record deletion!

Exporting Information

This section explains the benefits of exporting information, how to prepare for export, and how to export information from an open OmniForm form.

See "Importing Information" on page 8-21 for information on how to import information into a database.

The Benefits of Exporting Information

Export information from records to:

- Share information with other OmniForm databases.

  Information exported as a database file takes up considerably less disk space than the database itself. It can be copied more quickly than the entire database.

- Share information between different databases.

  You might have a database and decide you need information already entered in an OmniForm database. Simply export the needed information from OmniForm in the appropriate format and use the other database's commands to import it.

- Save other database users the time of entering data manually by sending them an OmniForm Data or other database file.

Preparing for Export

During import, you will *link* field names in the exported data file to field names in the import database. This tells OmniForm where to place the field information. If possible, try to:

- Match field names in the exported data to field names in the import database.
- Match field order in the exported data to field order in the import database.

This makes it easier to figure out which information will go in which fields when you link the fields on import.

For example, suppose you export information in the fields *Customer, Title,* and *Product,* in that order. You have the same field information in the import database, but the fields are named *What Bought*, *Name,* and *Position,* in that order. You could link *Customer⇨Name/Title⇨Position/Product⇨What Bought* easily but importing hundreds of fields with different names and field order would be difficult and time-consuming.

See Chapter 6, Designing a Form, for information on naming and reordering fields.

To export information:

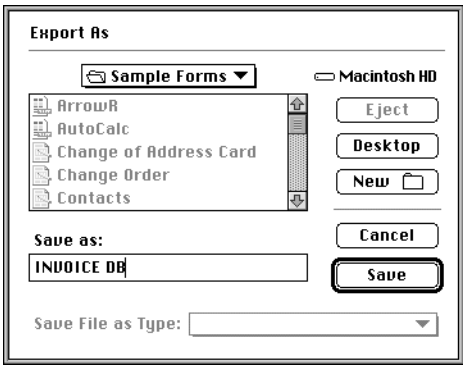
1 If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

2 Choose *Export...* in the File menu.
The Export Setup dialog box appears.

3 Select a database file type in the *Export To* pop-up menu.

- Select *OmniForm* to export information to an OmniForm Data file.
- Select *Text File* to export information to a tab- or comma-separated text file.
  See "Text File Export Options" on page 8-19 for more information on this dialog box.

4 Click *OK.*
The Export As dialog box appears.

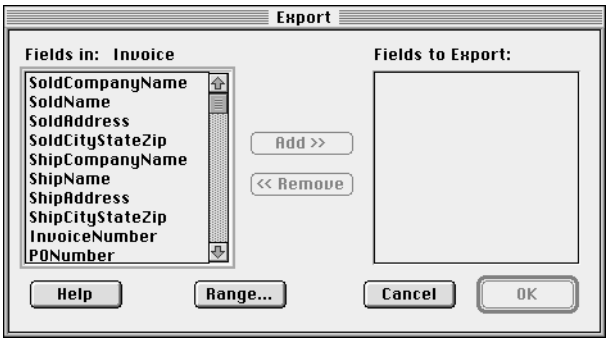


- A file name appears in the *Save as* text box.
  The file is named by default with the name of the currently open database. You can change the file name if you want.

The filename limit on the Macintosh is 32 characters, so long file names will be truncated. Do not change the filename to be the same name as an open file.

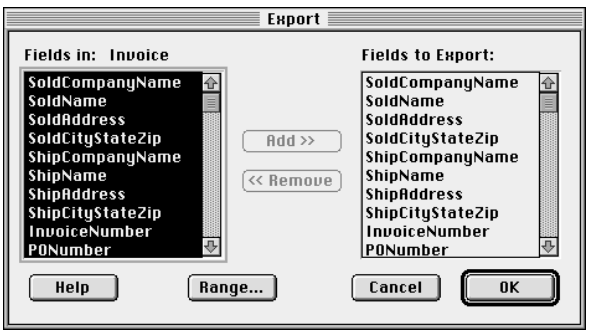
5 Select a location for the file.

6 Click *Save.*
The Export dialog box appears.



All the fields in your currently open database appear in the *Fields in* list box.

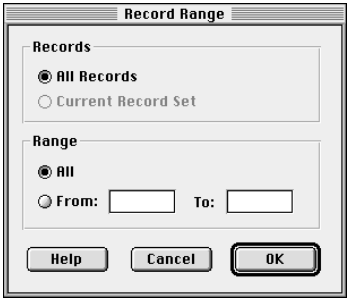
7 Select each field that contains the information to export and click *Add>>* to move it to the *Fields to Export* list box.



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

- Select a field on the right and click <<*Remove* if you decide not to export its information.

8 Click *Range...* to open the Record Range dialog box if you want to specify a range of records to export.



Otherwise, OmniForm exports all records by default.

- Select *All Records* to export all records in the current database.
- Select *Current Record Set* to export the current found set of records. This option is available after a search.

  Type the first record number to export in the *From* text box and the last record number to export in the *To* text box.
- Click *OK* to return to the Export dialog box.

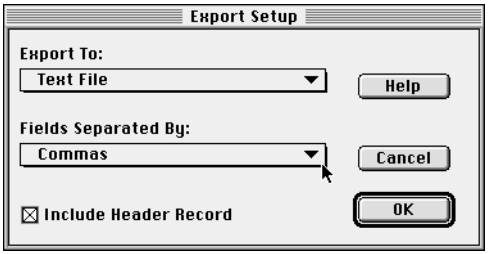
9 Click *OK.*

OmniForm exports the information in the selected fields to the specified file.

10 Click *OK* in the dialog box that tells you how many records were successfully exported.

Text File Export Options

Several options are available after you select *Text File* in the Export Setup dialog box.



- Select *Commas* in the *Fields Separated By:* pop-up menu to export information to a comma-separated text file. Information in each field will be separated by a comma and enclosed in quotes.
- Select *Tab* in the *Fields Separated By:* pop-up menu to export information to a tab-separated text file. Information in each field will be separated by a tab and enclosed in quotes.
- Select *Include Header Record* if you want the first line in the text file to list the name of each field exported.

If you export more than one record, each record in the text file will be separated by a line feed (return).

Exported Data and Shared Forms

This section explains how to use OmniForm Data files to open shared forms and how to set up a shared form location. A shared form is one other users can access.

When you export OmniForm data from a form, the form's file name is stored inside the Data file. OmniForm uses the file name information as well as file location information in the Options dialog box to locate and open a copy of the original form. The form automatically imports information from the Data file. This is useful for sharing data, especially if you want to send another user just part of a database.

To set up the shared form location:

1. Select or create a folder for your shared OmniForm forms.
2. In OmniForm, choose *Preferences...* in the Tools menu.
   The Preferences dialog box appears.
3. Click the *File Locations* tab.
4. Select *Shared Forms* in the *File Types* pop-up menu.
5. Select the location of your shared form(s) by clicking the *Select...* button to locate and select a folder.
6. Highlight and click *Select "folder name."*
7. Click *OK.*

All OmniForm users must enter the same file location in the Preferences dialog box to use shared forms.

To export the data:

- Use the *Export...* command in the File menu to create an OmniForm Data file. See "Exporting Information" on page 8-16 for information.

To use an OmniForm Data file to open a shared form:

1. Locate the OmniForm Data file to use.
2. Double-click the Data file.

   A copy of the shared OmniForm Form from which the OmniForm Data file was exported opens. OmniForm automatically imports the information in the OmniForm Data file into the form.

Importing Information

This section explains how to import field data (information) into an OmniForm database from another database source. You can import data from three sources:

- Another OmniForm Form

  The selected form must be closed.
- An OmniForm Data file

  This contains information exported from an OmniForm database.
- A comma- or tab-separated text file.

  Each record must be separated by a line feed (return).

Data consists of information entered in fields, such as text, check marks, and calculations. Importing data saves you the time of entering the same data manually and allows you to share data with other database users.

You must first export data from another database in order to import it into OmniForm. See "Exporting Information" on page 8-16 for information. See your database documentation if you are exporting from another database program.

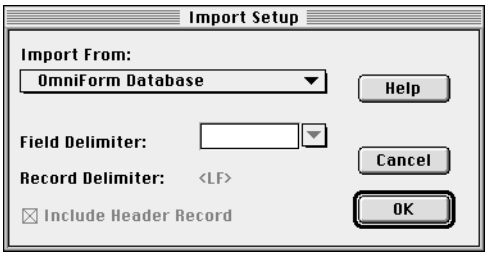
You cannot import information if data protection is turned on. See "Protecting Your Database" on page 8-26 for information.

To import field information:

1 Open or scan in a form.

2 If you are in Design View, click the Fill button in the standard toolbar or choose *Fill* in the View menu to switch to Fill View.

3 Choose *Import...* in the File menu.
The Import Setup dialog box appears.

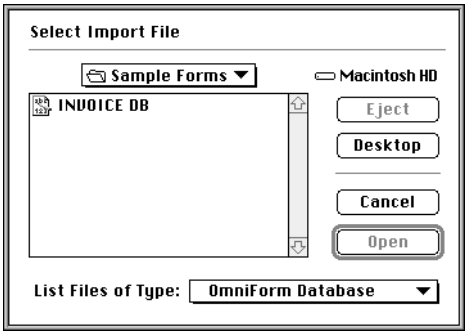


4 Select the type of information to import in the *Import From* pop-up menu.

- Select *OmniForm Database* to import information from an OmniForm Form or from an OmniForm Data file.
- Select *Text File* to import information from a tab- or comma-separated text file.

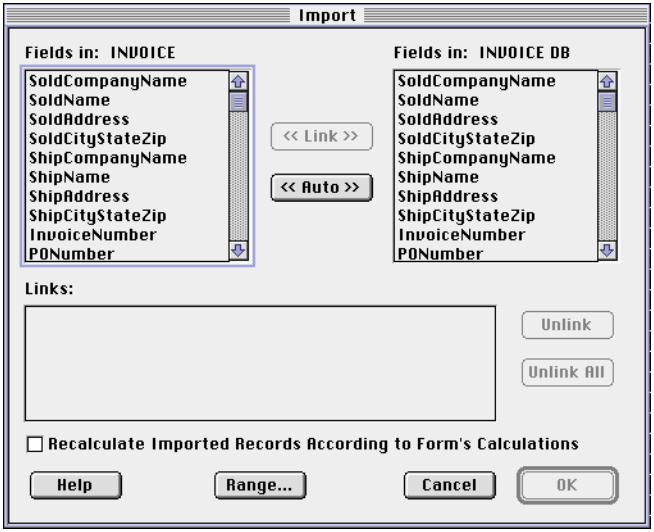
  See "Text File Import Options" on page 8-25 for more information on this dialog box.

5 Click *OK.*
The Select Import File dialog box appears.



6 Locate and select the file to import.

7 Click *Open*.
The Import dialog box appears.

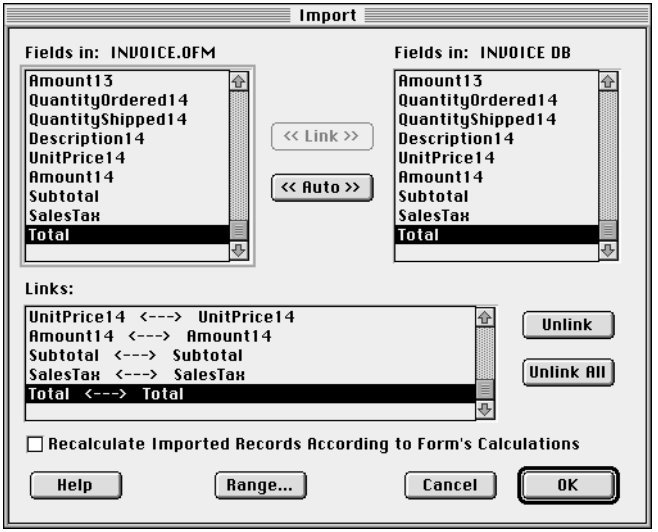


- Fields in the open OmniForm database appear on the left.
- Fields you can import from the other database appear on the right.

8 Link fields on the left to fields on the right.
This tells OmniForm which field data to import from the other database and where to import it in the current database.

- To link individual fields, select a field on the left, select its corresponding field on the right, and click *Link*.
- Click *Auto* to automatically link all fields with the same name.
  Some fields will not have matching names but contain the same information. Or, you may not want to import all fields.

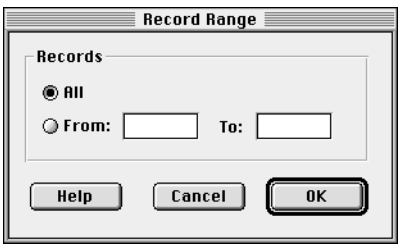
Linked fields appear in the *Links* list box.



- Select a link in the *Links* list box and click *Unlink* to unlink it.
- Click *Unlink All* to unlink all fields.
- Select *Recalculate Imported Records According to Form's Calculations* when it is selectable to apply existing calculations to the imported records.

9 Click *Range...* to open the Record Range dialog box to specify a range of records to import.

Otherwise, OmniForm imports all records by default.



- Type the first record number to import in the *From* text box and the last record number of the range to import in the *To* text box.
- Click *OK* to return to the Import dialog box.

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

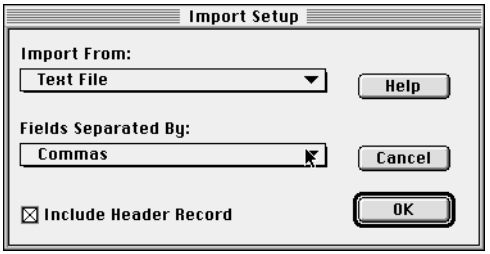
OmniForm imports the information into the selected fields, creating as many new records as necessary in the process.

11 Click *OK* in the dialog box that tells you how many records were imported successfully.

You can import Data files created in the Windows version of OmniForm. Convert the Windows file to a Macintosh-compatible format using PC Exchange before you import it.

Text File Import Options

Several options are available after you select *Text File* in the Import Setup dialog box.



- Select *Commas* in the *Fields Separated By:* pop-up menu to import a comma-separated text file. Each item separated by a comma will be imported into an individual field. Items enclosed in quotes will be imported as one field.
- Select *Tab* in the *Fields Separated By:* pop-up menu to import a tab-separated text file. Each item separated by a tab will be imported into an individual field. Items enclosed in quotes will be imported as one field.
- Select *Include Header Record* to have the import file's field names appear in the *Fields in* list box in the Import dialog box. (The field names must already be listed in the import file.)

  This is useful for linking fields. If you deselect this option, the field names will be generic: *Field 1, Field 2,* and so forth.

If you export more than one record, each record in the text file must be separated by a line feed (return) in order for OmniForm to interpret it as an individual record.

Protecting Your Database

This section describes how to protect both your data and form design from deletions or changes.

Remember, the form layout you create in Design View is used by every database record. Changes made in Design View affects *all* records in Fill View. This is important to remember if the database has multiple users. Deleting a fillable field in Design View deletes *all* information entered in that field in Fill View.

To protect your form or data:

1 If you are in Fill View, click the Design button in the standard toolbar or choose *Design* in the View menu.

2 Choose *Protection...* in the Tools menu to open the Protection dialog box.

3 Select *Protect Data, Protect Form,* or both.

4 Click *OK.*

When data protection is on, information is read-only. Users can export data or copy text but cannot alter form information in any other way such as by filling fields or importing data.

When form protection is on, users can change viewing preferences and use most basic file commands such as *Print* and *Save* but cannot format or redesign the form in any way.

An alert appears if you try to change the form's design or enter information while protection is on.

OmniForm Filler

You can have other users use the OmniForm Filler program to open any OmniForm form. Filler is an easy-to-use version of OmniForm that has a Fill View but no Design View. Therefore, Filler users cannot edit the form's design in any way.

The data protection option, when set for a form in OmniForm, is also enabled for that form in OmniForm Filler. It cannot be turned off in OmniForm Filler.

See "Protecting Your Database" on page 8-26 for detailed information on the data protection option.

Contact your local distributor to purchase OmniForm Filler. In the U.S., you can call (800) 654-1187 to order OmniForm Filler.

Chapter 9

Using Calculations

This chapter describes how to use OmniForm's calculation features. OmniForm automatically performs calculations when you fill in the appropriate field(s).

Use calculations to automate data entry and prevent errors. For example, the average person might find it time-consuming to add a column of 100 numbers, and easy to make an error, but OmniForm can return an error-free sum in a fraction of a second. All you have to do is define the calculation properly and OmniForm does the rest of the work.

This chapter contains the following sections:

- Calculation Overview
- Operators
- Functions

Calculation Overview

This section gives an overview of how to create calculations. It contains the following topics:

- Creating a Calculation
- Calculation Guidelines
- Using the Recalculate... Command
- Usage Conventions

See "Tutorial 3 — Design Your Own Form" on page 3-21 for step-by-step instructions on creating a simple calculation.

Creating a Calculation

Calculations are created in Design View. You can create a calculation for fill text, comb, check box, and circle text objects.

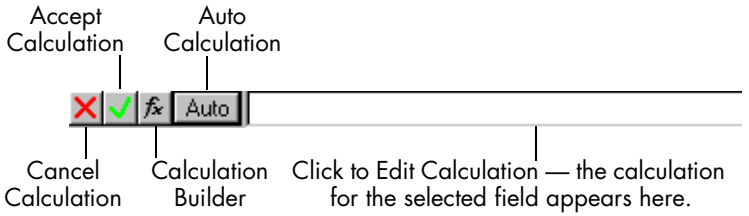
You must open the calculation toolbar to begin.

To open the calculation toolbar:

1 If you are in Fill View, click the Design button in the standard toolbar or choose *Design* in the View menu.

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

The calculation toolbar appears.



3 Select a fill text, comb, check box, circle text, or table object in your form to activate the toolbar.

The calculation toolbar contains four buttons and a text box.

- Cancel Calculation button

  Click this to revert to the last calculation accepted. The text box clears if no version was accepted.

- Accept Calculation button

  Click this to accept the calculation in the text box.

- Calculation Builder button
  Click this to open the Calculation Builder dialog box and create your own calculation.

- Auto Calculation button
  Click this to have OmniForm attempt to define a calculation automatically. OmniForm can determine an auto calculation for an entire table in some circumstances.
- Calculation text box
  The calculation for the selected field appears here. Click in the text box to edit a calculation manually.

4 Create a calculation in one of three ways:

- Use the Calculation Builder to define a calculation.
  See "The Calculation Builder" on page 9-3.
- Have OmniForm define a calculation automatically.
  See "Auto Calculations" on page 9-5.
- Click in the calculation text box and type a calculation.
  Follow the guidelines in "Calculation Guidelines" on page 9-7. See "Functions" on page 9-11 for examples.

The Calculation Builder

The Calculation Builder dialog box contains operators, a list of all the fields in your form, and functions for creating calculations.

To define a calculation with the Calculation Builder:

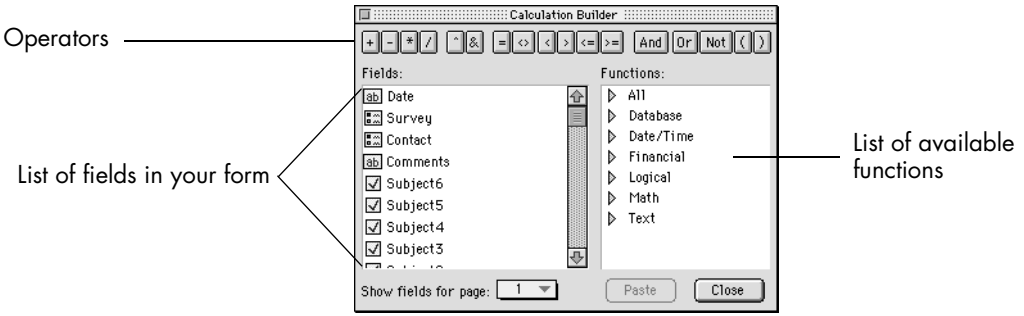
1 Click the Calculation Builder button in the calculation toolbar.
The Calculation Builder dialog box contains the following:

- *Operator* buttons
  Each button represents an operator. Click a button to insert an operator in the calculation text box.
  See "Operators" on page 9-9 for detailed information.
- *Fields* list
  This list contains all the available fields in your form. Double-click a field name in this list to place it in the calculation text box, or select it and click *Paste.*
  Alternatively, click any field in your form to insert its name in the calculation text box. This is useful if you have many fields listed or if they do not have unique names. You can also drag the cursor around multiple objects to insert each one.

- *Functions* list

  This list contains all available functions that can be used in a calculation. Double-click a function to insert it in the calculation text box, or select it and click *Paste*.

  See "Functions" on page 9-11 for detailed information.



2 Select the operators, fields, and functions that you need for your calculation.

3 Click the Accept Calculation button to define the calculation on the field and close the Calculation Builder dialog box.

- A calculation is defined on the selected field when you click the Accept Calculation button. OmniForm performs the calculation automatically in fill mode when the appropriate fields are filled.

- You can click the Cancel Calculation button to clear the calculation text box or to revert to the last accepted calculation.
- You can manually delete entries in the text box and click the Accept Calculation button if you want to clear the box entirely. This is useful if clicking the Cancel Calculation button causes it to revert to a previously accepted version.

4 Click the Calculation button in the standard toolbar or choose *Calculation* in the Tools menu to close the calculation toolbar.

Closing the toolbar also accepts the current calculation.

Example

Suppose you wanted to create a calculation for a *Subtotal* field in an invoice. The *Subtotal* field is the sum of the *Price1* and *Price2* fields. There is often more than one way to create a calculation. Here are two calculations you could create:

- `[Price1]+[Price2]`
- `Sum([Price1],[Price2])`

Both calculations return the same result. The first calculation is simple addition. It is easy for new users to create.

The second calculation uses the *Sum* function and is more complex than the first calculation. This calculation is useful for adding multiple fields because you do not need to place the Addition operator between them.

OmniForm automatically inserts the necessary parentheses, brackets, and commas when you create a calculation using the Calculation Builder. See "Calculation Guidelines" on page 9-7.

Auto Calculations

To create an auto calculation, OmniForm looks for such common field names as *Quantity, Price, Total,* and *Sum.* It also determines calculations based on field type, field names, and column header labels. If you selected a field named *Total,* for example, OmniForm would look for fields above the *Total* field to sum.

This is one reason it is important for fields to have unique names. See "Defining Objects" on page 6-16 for detailed information.

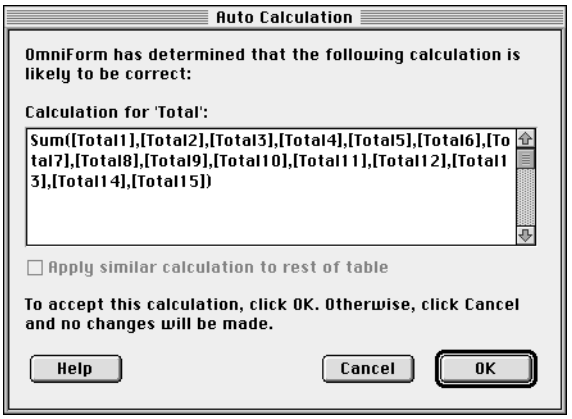
1. Select a fill text, comb, check box, circle text, or table object in your form to activate the toolbar.

   A calculation appears in the calculation text box if one was defined for this object before. If so, proceed to step 4.

2. If no calculation appears, click the *Auto* button in the calculation toolbar.

   A message tells you if no auto calculation could be created. See "The Calculation Builder" on page 9-3 if OmniForm could not create a calculation and you want to create your own.

The Auto Calculation dialog box appears if OmniForm proposes an auto calculation.



3 Accept or cancel OmniForm's proposed calculation.

- Select *Apply similar calculation to rest of table* to apply the proposed calculation to similar fields in a table.
- Click *OK* to accept the calculation.

  The calculation appears in the toolbar's text box.
- Click *Cancel* to close the dialog box without creating a calculation.

4 Edit the calculation in the toolbar if you need to:

- Click in the calculation text box and make manual changes, or click the Calculation Builder button to open the Calculation Builder dialog box. See "The Calculation Builder" on page 9-3.

- Click the Accept Calculation button to accept changes.

- Click the Cancel Calculation button to close the Calculation Builder and revert to the version created by OmniForm.

  You can manually delete entries in the text box and click the Accept Calculation button to clear the box entirely. This is useful if clicking the Cancel Calculation button causes the calculation to revert to a previously accepted version.

5 Choose *Calculation* in the Tools menu to close the toolbar.

Using the *Recalculate...* Command

Recalculating records applies any new or changed calculations to *all* selected records in a database. Until you use the *Recalculate...* command, new or changed calculations apply only to new records or to current records whose relevant field entries change. See "Recalculating Records" on page 8-13 for detailed information.

Calculation Guidelines

Keep these guidelines in mind as you work with calculations:

- OmniForm automatically inserts list separators, parentheses, and brackets when you use the Calculation Builder or the Auto button, and when you click the Accept Calculation button.
- OmniForm automatically removes extra spaces (except a space in a field name) when it accepts a calculation.

  You can insert spaces between operators and after commas when creating a calculation if this helps you see it more easily.
- Brackets (**[]**) must enclose a field name that contains a space.

  `[Quantity Ordered] * [Unit Price]`

  OmniForm does not automatically insert brackets around a manually created field name that contains a space.
- Parentheses (**()**) must enclose an entire function.

  `Sum([Price1],[Price2])`

  This tells OmniForm where the function begins and ends.
- You must insert a comma between fields in a manually created function.

  `Sum([Price1],[Price2])`
- If you manually enter a decimal number in a calculation, you must use the decimal selection selected in the Numbers control panel.
- Quotes (**" "**) must enclose a text string.

  `If([Name1]="Ann","Dear Ann:","Dear Customer:")`
- If you change a field name and that field is part of a calculation, you must change the field name in the calculation as well.

  OmniForm cannot perform the calculation otherwise.
- Calculations are performed in tabbing order.
- If a calculation contains another field that has a calculation, the other field's calculation is performed first.

Usage Conventions

Substitute the appropriate field name where you see *num* and *str* in the function examples. Parentheses are required where indicated. Below is a list of conventions showing operator and function usage.

date	date value: the expression must evaluate to a valid date
time	time value: the expression must evaluate to a valid time
num	number or numeric expression, num1, num2, etc. indicate additional number values
str	text string: str1, str2, etc. indicate additional string values
...	additional repeating values of the given type may be entered
[ ]	brackets inserted around field names
log exp	logical expression
true exp	true expression
false exp	false expression

Operators

Operators represent mathematical, comparison, logical, and text operations to be performed within a calculation. You must have an operator between fields in a calculation.

For example, a calculation for a *Total* field might look like this:

```
[Price1] + [Price2] + [Price3]
```

The plus signs between the field names are the *Addition* operators in the calculation.

The calculation could also look like this:

```
Sum([Price1],[Price2],[Price3])
```

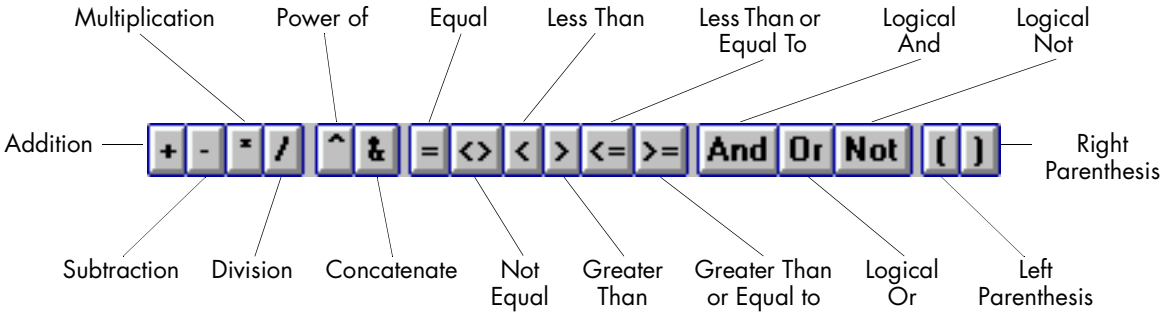
The parentheses are the operators in the calculation. Commas, although not operators, also separate the fields.

You must insert the proper parentheses, brackets, and commas when you create a function manually or OmniForm will not accept the calculation. See "Calculation Guidelines" on page 9-7 for detailed information.

OmniForm automatically inserts commas, parentheses, and brackets when you create a calculation with the Calculation Builder or the Auto button, and when you click the Accept Calculation button.

Operator Buttons

See "Calculation Overview" on page 9-2 for instructions on creating calculations.



Operators — Quick Reference

See "Usage Conventions" on page 9-8 for information on how to interpret the examples in the following table.

Operator	Type	Description	Usage Example
+	mathematical	Addition: add numbers or fields	[num1] + [num2]
-	mathematical	Subtraction: subtract numbers or fields	[num1] - [num2]
*****	mathematical	Multiplication: multiply numbers or fields	[num1] * [num2]
/	mathematical	Division: divide numbers or fields	[num1] / [num2]
^	mathematical	Power of: raise a number or field by a power	[num1]^2
&	text	Concatenate: put together strings	"str1"&"str2"
=	comparison	Equal: compare values or results	If ([num1]=[num2], true exp, false exp)
<>	comparison	Not Equal: compare values or results	If ([num1]<>[num2], true exp, false exp)
<	comparison	Less Than: compare values or results	If ([num1]<[num2], true exp, false exp)
>	comparison	Greater Than: compare values or results	If ([num1]>[num2], true exp, false exp)
<=	comparison	Less Than or Equal to: compare values or results	If ([num1]<=[num2], true exp, false exp)
>=	comparison	Greater Than or Equal to: compare values or results	If ([num1]>=[num2], true exp, false exp)
And	logical	Logical And: use with Logical If to put together more than one condition. All conditions must be true for the Logical If function to be true.	If ([num1]=[num2] And [num3]=[num4], true exp, false exp)
Or	logical	Logical Or: use with Logical If to include more than one condition. Only one condition must be true for the Logical If function to be true.	If ([num1]=[num2] Or [num3]=[num4], true exp, false exp)
Not	logical	Logical Not: used with the Logical If function to negate a condition.	If ([num1]=[num] And NOT [num3]=[num4], true exp, false exp
()	mathematical	Left and Right Parentheses: show precedence. A matching set of parentheses must exist.	([num1]+[num2]) * 3
" "	text	Constant Quotes: mark the beginning and end of a character used as a constant or characters used as a text string. A matching set of quotes must exist.	"John Doe"

Functions

This section defines each OmniForm function and shows how to use it in a calculation. Functions are listed alphabetically. See "Functions — Quick Reference" on page 9-33 for an overview of each function.

Functions are single words used by OmniForm to represent operations within a calculation. Functions can use field values, information you enter, and information from outside sources such as the computer date.

See "Creating a Calculation" on page 9-2 for instructions on creating calculations. See "Usage Conventions" on page 9-8 for a list of the conventions used in this chapter.

The format of the values returned in the examples is dependent on:

- The *Language* selection in the *International* tab of the Options dialog box
- The *Format* selection in the *Properties* tab of the Object Definition dialog box for the selected object

Abs (Absolute Value)

The Abs function returns the positive value of a number or numeric expression.

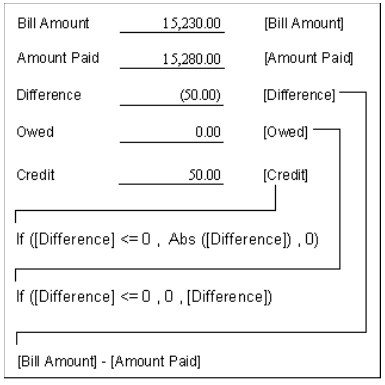
Usage Example

Abs[num1]

If the field [num1] = -50

Then the calculation Abs[num1] returns 50

In the example below, the *Amount Paid* field is subtracted from the *Bill Amount* field and placed in the *Difference* field. The absolute value of the difference appears in the *Credit* field.



Avg (Average)

The Avg function returns the average value of a set of numbers and/or numeric expressions. The average value is determined by adding all the values and dividing by the number of values.

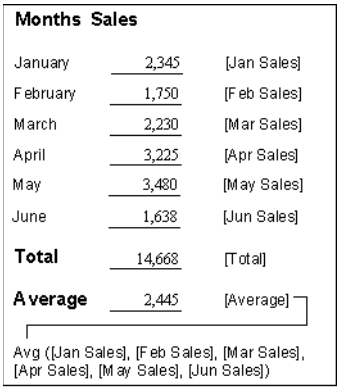
Usage Example

Avg([num1,num2] ...)

If the field entries are 11, 14, and 20

Then the calculation Avg([num1],[num2],[num3]) returns 15

In the example below, the average of sales for the past six months is calculated. It appears in the *Average* field.



Date (Current Date)

The Date function returns the current date. The date is derived from the current system date. The date is formatted according to how you define it in the Object Definition dialog box.

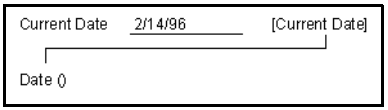
Usage Example

Date()

If a field contains the function Date() and the current date is February 14, 1996

Then the value returned is 2/14/96

In the example below, the current date based on the computer system date is put in the *Current Date* field.



DayName

The DayName function returns the name of the day of the week for a given date.

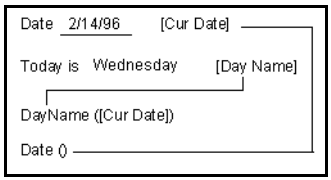
Usage Example

DayName(Date())

If the current date is February 14, 1996

Then the calculation DayName(Date())returns Wednesday

In the example below, the name of the day of the week is calculated using the *Cur Date* field and put in the *Day Name* field.



DayOfMonth

The DayOfMonth function returns the number for the day of the month for a given date.

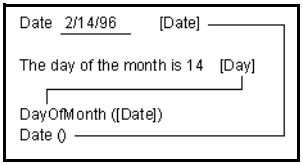
Usage Example

DayOfMonth(Date())

If the current date is February 14, 1996

Then the calculation DayOfMonth(Date()) returns 14

In the example below, the day of the month is extracted from the *Date* field and placed in the *Day* field.



DayOfWeek

The DayOfWeek function returns a number for the day of the week for a given date. The values returned are: Sunday1, Monday2, Tuesday3, Wednesday4, Thursday5, Friday6, and Saturday7.

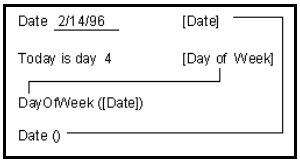
Usage Example

DayOfWeek(Date())

If the current date is February 14, 1996

Then the calculation DayOfWeek(Date())returns 4 (Wednesday)

In the example below, the day of the week from the *Date* field appears in the *Day of Week* field.



DayOfYear

The DayOfYear function returns the number for the day of the year for a given date.

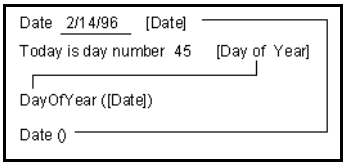
Usage Example

DayOfYear(Date())

If the current date is February 14, 1996

Then the calculation DayOfYear(Date()) returns 45

In the example below, the day of the year from the *Date* field appears in the *Day of Year* field.



Exp (Exponentiation)

The Exp function returns the value of the constant e to the power of a number or numeric expression. The value of e, the base of natural logarithms, is approximately 2.71828. This function is the inverse of the Ln function.

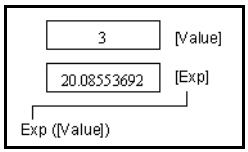
Usage Example

Exp([num1])

If the field [num1] = 3

Then the calculation Exp([num1]) returns 20.08553692

In the example below, the *Exp* field is calculated using the number in the *Value* field.



FV (Future Value)

The FV function returns the future value of an investment. The future value is determined by computing a series of constant periodic payments made at the end of each period, earning a fixed interest rate per period, for a fixed number of periods.

Usage Example

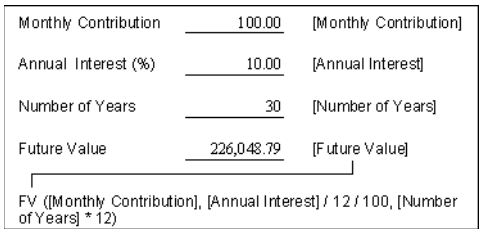
FV([payment num],[rate num],[num of periods])

If the payment is $100, the annual interest rate is 8%, and the number of years is 30

Then the calculation FV([payment num],[rate num],[num of periods]) returns 11,328.32 (approximately)

It is important to have the fields in the proper order as listed above.

In a different example below, the future value of a savings plan is calculated and put in the *Future Value* field.



Hour

The Hour function returns the hour (HH) portion of a given time (HH:MM:SS). The hour is based on a 24-hour clock and ranges from 0–23.

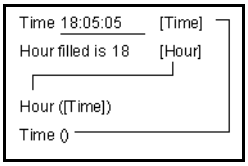
Usage Example

Hour(Time())

If the current time is 18:05:05

Then the calculation Hour(Time()) returns 18

In the example below, the hour is taken from the *Time* field and put in the *Hour* field.



If

The If function evaluates a logical expression and returns the true expression if it evaluates to true (“yes” or “true”). Otherwise, it returns the false expression.

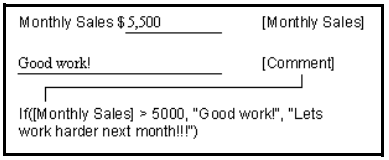
Usage Example

If(log exp,true exp,false exp)

If the field [Monthly Sales] = 5500

Then the calculation If ([Monthly Sales]>5000,”Good work!”,”Let’s work harder next month!!!”) returns the string “Good work!”

In the example below, a text string is placed in the *Comment* field based on the value for the *Monthly Sales* field.



Int (Integer)

The Int function returns the integer portion of a number or numeric expression.

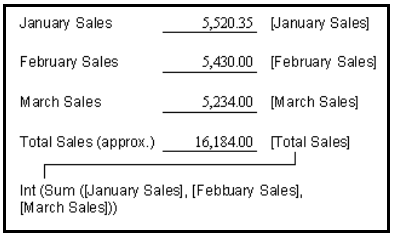
Usage Example

Int([num1])

If the field [num1] = 16,184.35

Then the calculation Int([num1]) returns 16,184.00

In the example below, the total amount (dollar portion only) is put in the *Total Sales* field.



Left

The Left function returns characters from a given string from the first character on the left to the right for the specified number of characters.

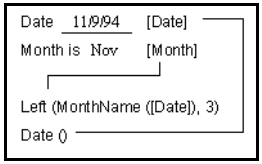
Usage Example

Left([str1],number of characters)

If the field [str1] = November

Then the calculation Left([str1],3) returns Nov

In the example below, the first three characters of the month's name from the *Date* field appear in the *Month* field.



Length

The Length function returns the number of characters in a given string. The calculation counts all characters in a string including spaces.

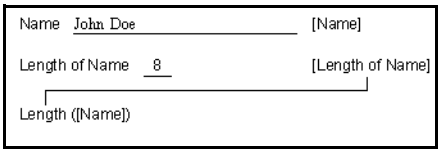
Usage Example

Length([str1])

If the field [str1] = John Doe

Then the calculation Length([str1]) returns 8

In the example below, the length of the name in the *Name* field is put in the *Length of Name* field.



Ln (Natural Logarithm)

The Ln function returns the natural logarithm (base e) of a number or numeric expression. The number or numeric expression must be greater than 0. Ln is the inverse of the Exp function.

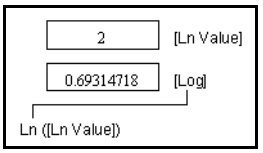
Usage Example

Ln([num1])

If the field [num1] = 2

Then the calculation Ln([num1]) returns 0.69314718 (approximately)

In the example below, the natural logarithm is calculated using the *Ln Value* field and put in the *Log* field.



Log (Base 10 Logarithm)

The Log function returns the common logarithm (base 10) of a number or numeric expression. The number or numeric expression must be greater than 0.

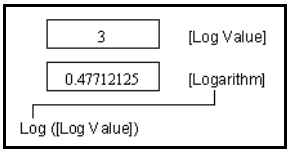
Usage Example

Log([num1])

If the field [num1] = 3

Then the calculation Log([num1]) returns 0.47712125

In the example below, the common logarithm is calculated using the *Log Value* field and put in the *Logarithm* field.



Lower

The Lower function returns the lower case of a given string.

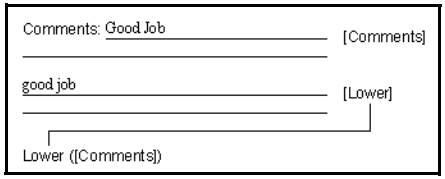
Usage Example

Lower([str1])

If the field [str1] = GOOD JOB

Then the calculation Lower([str1]) returns good job

In the example below, the *Lower* field displays the same information as the *Comment* field but in lower case.



Max (Maximum)

The Max function returns the maximum (highest) value of a set of numbers and/or numeric expressions.

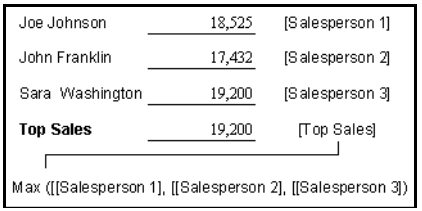
Usage Example

Max([num1],[num2] ...)

If the numbers in the fields are 150, 200, and 45

Then the calculation Max([num1],[num2],[num3]) returns 200

In the example below, the *Top Sales* field displays the highest sales made.



Middle

The Middle function returns the characters from a given string beginning at a specified starting position from the left in the string, and continuing to the right for the specified number of characters. The first (beginning) position in the string is 1.

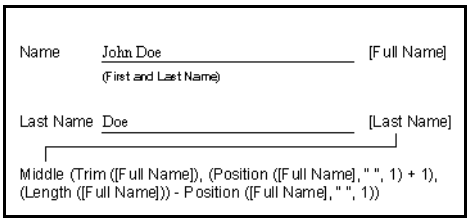
Usage Example

Middle([str1],start position number,number of characters)

If the field [str1] = 2/14/96

Then the calculation Middle([str1],3,2) returns 14

In the example below, the *Middle* and several other functions extract the last name from the *Full Name* field and place it in the *Last Name* field.



Refer to these other functions elsewhere in this section for more information.

Min (Minimum)

The Min function returns the minimum (lowest) value of a set of numbers and/or numeric expressions.

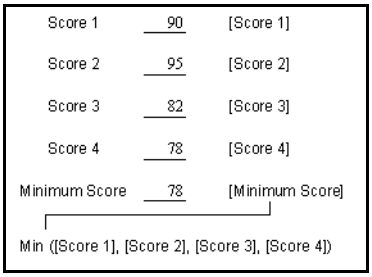
Usage Example

Min([num1],[num2] ...)

If the numbers in the fields are 90, 95, 82 and 78

Then the calculation Min([num1],[num2],[num3],[num4]) returns 78

In the example below, the minimum test score is picked out of a list of scores and put in the *Minimum Score* field.



Minute

The Minute function returns the minute (MM) portion of a given time (HH:MM:SS). The minute ranges from 0–59.

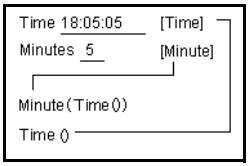
Usage Example

Minute(Time())

If the current time is 18:05:05

Then the calculation Minute(Time()) returns 5

In the example below, the minutes are put in the *Minutes* field using the *Time of Day* field.



Mod (Modulus (Remainder))

The Mod function returns the remainder of a number or numeric expression divided by another number or numeric expression. A positive number is returned if the dividend is positive, and a negative number is returned if the dividend is negative.

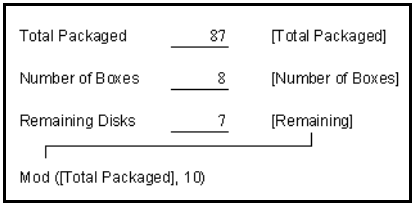
Usage Example

Mod([dividend num],[divisor num])

If the numbers in the fields are 87 and 8

Then the calculation Mod([dividend num],[divisor num]) returns 7 (87 ÷ 8 = 10 with a remainder of 7)

In the example below, the number of computer disks remaining after packaging full boxes is placed in the *Remaining* field.



Month

The Month function returns the number of the month for a given date. The month ranges from 1 to 12.

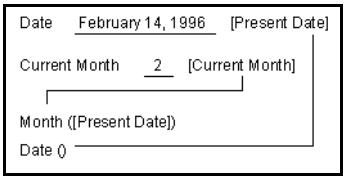
Usage Example

Month(Date())

If the current date is February 14, 1996

Then the calculation Month(Date()) returns 2

In the example below, the month is put in the *Current Month* field using the current system date calculated in the *Present Date* field.



MonthName

The MonthName function returns the full name of the month for a given date.

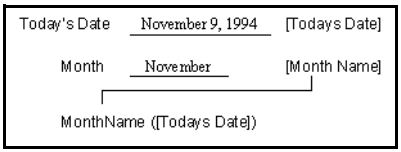
Usage Example

MonthName(Date())

If the current date is February 14, 1996

Then the calculation MonthName(Date()) returns February

In the example below, the name of the month is put in the *Month Name* field using the current system date calculated in the *Today's Date* field.



Pi

The Pi function returns the value of the constant Pi (approximately 3.14159265).

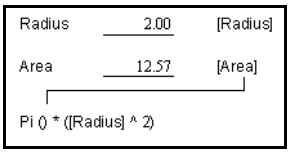
Usage Example

Pi()

If a field contains the function Pi()

Then the value of Pi is returned as 3.14159265

In the example below, the area of a circle is calculated using Pi and the *Radius* field and put in the *Area* field.



PMT (Payment)

The PMT function returns the payment amount required for a given principal at a fixed interest rate per period, for a fixed number of payment periods. It assumes payments are made at the end of each period.

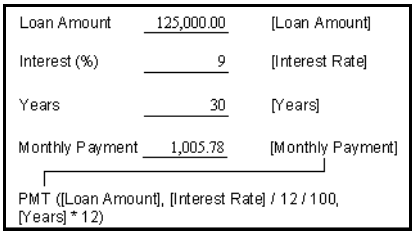
Usage Example

PMT([principal num],[interest rate num],[num periods])

If the principal is $30,000, the annual interest rate is 9% (.75% monthly), and the number of years is 30

Then the calculation PMT([principal num],[interest rate num],[num periods]) returns 241.39 (approximately)

It is important to have the fields in the proper order as listed above. In a different example below, the *Monthly Payment* field is calculated based on entries in the *Loan Amount, Interest Rate,* and *Years* fields.



Position

The Position function returns the starting position of the find string in a given source string, beginning at the specified starting position of 1 from the left. If the find string is not found, 0 is returned.

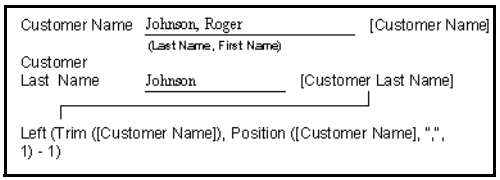
Usage Example

Position([source str],[find str],[start position num])

If a field contains the name Doe, John and you want to find the comma position

Then the calculation Position("[source str]",",",1) returns 4

In the example below, the Position function locates the comma. Other functions are then used to extract the last name from the *Customer Name* field and place it in the *Customer Last Name* field.



Proper

The Proper function returns the given string with the first character of each word converted to upper case and the rest of the characters in each word converted to lower case.

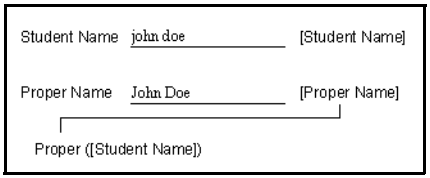
Usage Example

Proper([str1])

If the field [str1] = john doe

Then the calculation Proper([str1]) returns John Doe

In the example below, the Proper function places the *Student Name* entry in the *Proper Name* field with the first letter of each name capitalized.



PV (Present Value)

The PV function returns the present value of an investment. The present value is the total current value of a series of future payments made per period, at a fixed interest rate per period, for a fixed number of payment periods. It assumes that payments are made at the end of each period.

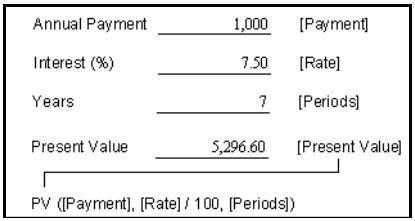
Usage Example

PV([payment num],[interest rate num],[num of periods])

If a $1000 payment is made annually, the annual interest rate is 7.5%, and the payment period is for 7 years

Then the calculation PV(1000,7.5,7) returns 5,296.60 (approximately)

In the example below, the present value of an annuity that is paid out is calculated and placed in the *Present Value* field.



RecordCount

The RecordCount function returns the number of records in the current database.

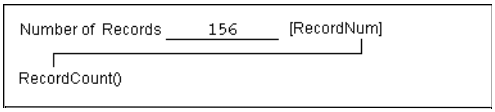
Usage Example

RecordCount()

If a field contains the function RecordCount() and the database contains 156 records

Then the value returned is 156

In the example below, the number of records appears in the *Number of Records* field.



Replace

The Replace function returns a replacement string for a given source string starting at the specified position from the left in the source string for the specified length. The beginning position in the string is 1.

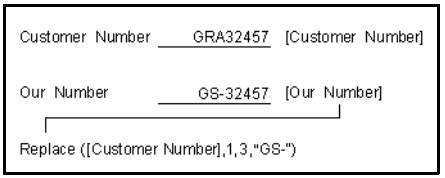
Usage Example

Replace([source str],start position num,num of characters,"replacement str")

If the field [source str] = GRA32457 and you want it to begin with GS-

Then the calculation Replace([source str],1,3,"GS-") returns GS-32457

In the example below, the *Customer Number* entry is reformatted and placed in the *Our Number* field.



Replicate

The Replicate function returns a given string repeated the specified number of times. The maximum length returned is 16,000 characters.

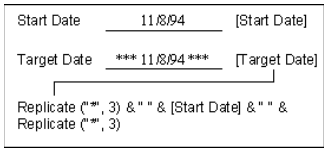
Usage Example

Replicate(str1, num of times to replicate)

If the field [str1] = *

Then the calculation Replicate("*", 10) returns **********

In the example below, the *Start Date* field is put into the *Target Date* field with leading and trailing asterisks.



Right

The Right function returns characters from a given string beginning with the first character on the right and continuing to the left for the specified number of characters.

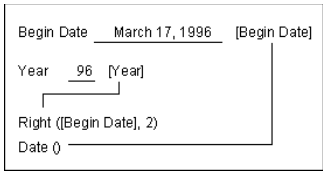
Usage Example

Right ([str1], num of characters)

If the field [str1] = 1996

Then the calculation Right ([str1],2) returns 96

In the example below, the year is extracted from the *Begin Date* field and placed in the *Year* field.



Round

The Round function returns the value of a number or numeric expression rounded to the specified decimal places in the second parameter.

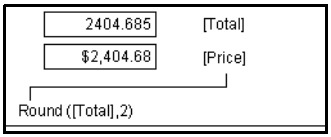
Usage Example

Round([num1], num of decimal places)

If the field [num1] = 2404.685

Then the calculation Round([num1],2) returns 2404.68

In the example below, the value in the *Total* field is extracted and rounded to two decimal places in the *Price* field.



Second

The Second function returns the second (SS) portion of a given time (HH:MM:SS). The second ranges from 0–59.

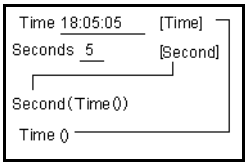
Usage Example

Second(Time())

If the current time is 18:05:05

Then the calculation Second(Time()) returns 5

In the example below, the seconds are extracted from the *Time* field and placed in the *Second* field.



Sign

The Sign function returns a value of 1 if a number or numeric expression is positive, -1 if it is negative, and 0 if it is 0.

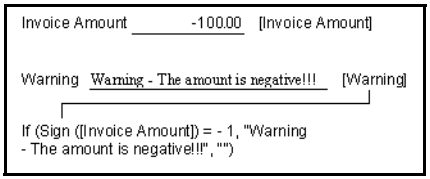
Usage Example

Sign([num1])

If the field [num1] = -100

Then the calculation Sign([num1]) returns -1

In the example below, the *Invoice Amount* field is evaluated and a message is put in the *Warning* field if it is negative. The Sign function is used to determine if the value is negative.



Sqrt (Square Root)

The Sqrt function returns the square root of a number or numeric expression. The number or numeric expression must be positive.

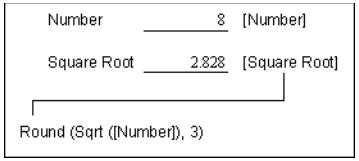
Usage Example

Sqrt([num1])

If the field [num1] = 8

Then the calculation Sqrt([num1]) returns 2.82842712

In the example below, the square root is calculated using the *Number* field and put in the *Square Root* field. The Round calculation is used to round the result to three decimal places.



Sum

The Sum function returns the total value of a set of numbers and/or numeric expressions added together.

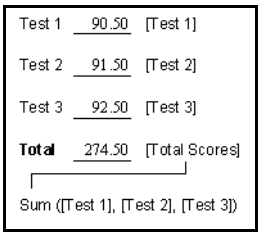
Usage Example

Sum([num1],[num2], ...)

If the numbers in the fields are 3, 6, and 8

Then the calculation Sum([num1],[num2],[num3]) returns 17

In the example below, test scores are added together and put in the *Total Scores* field.



Time

The Time function returns the current time based on the current system clock. The time is returned as HH:MM:SS.

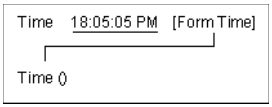
Usage Example

Time()

If a field contains the function Time() and the current time is 18:05:05

Then the value returned is 18:05:05

In the example below, the time is put in the *Form Time* field. (Time formatting depends on the current field definition.)



Trim

The Trim function returns a given string with all leading, trailing, and extra blank spaces removed.

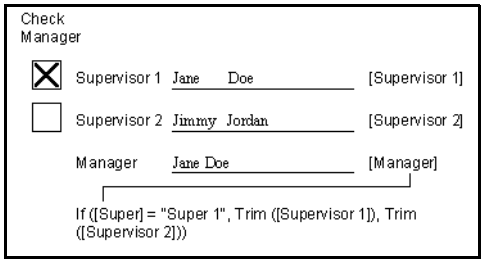
Usage Example

Trim([str1])

If the field [str1] = Jane Doe

Then the calculation Trim([str1]) returns Jane Doe

In the example below, the *Supervisor 1* field or *Supervisor 2* field is placed in the *Manager* field depending on which box is checked. The name is trimmed of all extra blank spaces.



Trunc (Truncate)

The Trunc function returns the value of a number or numeric expression truncated to the specified number of decimal places in the second parameter.

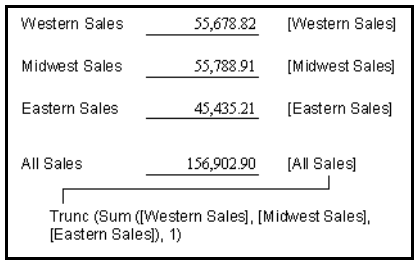
Usage Example

Trunc([num1],num of decimal places)

If the field [num1] = 3.1415926

Then the calculation Trunc([num1],4) returns 3.1415

In a different example below, the sales are summed and placed in the *All Sales* field. The value is truncated down to 10 cents.



Upper

The Upper function returns a given string as uppercase.

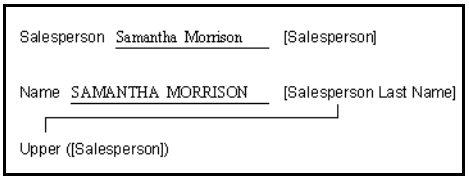
Usage Example

Upper([str1])

If the field [str1] = Samantha Morrison

Then the calculation Upper([str1]) returns SAMANTHA MORRISON

In the example below, the *Salesperson* field is converted to all upper case and put in the *Salesperson Last Name* field.



Year

The Year function returns the numeric year for a date. The year is returned as CCYY.

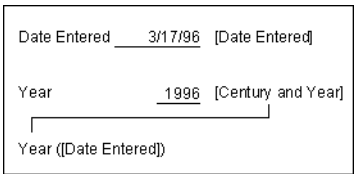
Usage Example

Year([date1])

If the field [date1] = March 17, 1996

Then the calculation Year([Date]) returns 1996

In the example below, the century and year is extracted from the *Date Entered* field and put in the *Century and Year* field.



Functions — Quick Reference

See "Usage Conventions" on page 9-8 for information on how to interpret the examples in the following table. A brief description and usage of each function is listed.

Function	Type	Description	Usage Example
Abs	mathematical	Absolute Value: returns the value of num	Abs(num)
Avg	statistical	Average: returns the average for num1, num2, etc.	Avg(num1, num2, ...)
Date	date	Date: returns the current date as MM/DD/YY based on the current system date	Date()
DayName	date	DayName: returns the name of the day of the week for a given date	DayName(date)
DayOfMonth	date	DayOfMonth: returns the number for the day of the month for a given date	DayOfMonth(date)
DayOfWeek	date	DayOfWeek: returns the number for the day of the week for a given date. Sunday returns 1, Monday returns 2, etc.	DayOfWeek(date)
DayOfYear	date	DayOfYear: returns the number for the day of the year for a given date	DayOfYear(date)
Exp	mathematical	Exponentiation: returns the value of the constant *e*, the base of natural logarithms (approximately 2.71828) to the power of num, inverse of Ln function	Exp(num)
FV	financial	Future Value: returns the future value of an investment given a payment num, interest rate num, and num of periods	FV(payment num, rate num, num of periods)
Hour	time	Hour: returns the hour for a given time	Hour(time)
If	logical	If: if the log exp is true, the true exp is executed, otherwise, the false exp is executed	If(log exp, true exp, false exp)
Int	mathematical	Integer: returns the integer portion or whole number of num	Int(num)

Left	text	Left: returns the characters for str beginning from the left and proceeding to the right for num characters	Left(str, num)
Length	text	Length: returns the number of characters in str	Length(str)
Ln	mathematical	Natural Logarithm: returns the natural logarithm (base *e* — approximately 2.71828) of num, inverse of Exp function of num	Ln(num)
Log	mathematical	Base 10 Logarithm: returns the base 10 logarithm of num	Log(num)
Lower	text	Lower: converts the str to lowercase	Lower(str)
Max	statistical	Maximum: returns the maximum (highest) value for num1, num2, etc.	Max(num1, num2, ...)
Middle	text	Middle: returns the characters for str beginning at start position num for num of characters	Middle(str, start position num, num of characters)
Min	statistical	Minimum: returns the minimum (lowest) value for num1, num2, etc.	Min(num1, num2, ...)
Minute	time	Minute: returns the minute for a given time	Minute(time)
Mod	mathematical	Modulus: returns the remainder of the dividend num divided by the divisor num	Mod(dividend num, divisor num)
Month	date	Month: returns the number of the month for a given date	Month(date)
MonthName	date	MonthName: returns the number of the month for a given date	MonthName(date)
Pi	mathematical	Pi: returns the value of Pi (approximately 3.14159265)	Pi()
PMT	financial	Payment: returns the payment required given a principal num, interest rate num, and num of periods	PMT(principal num, interest rate num, num of periods)
Position	text	Position: returns the position in the source str of the find str beginning at start position num	Position(source str, find str, start position num)
Proper	text	Proper Case: converts the first letter of each word in str to uppercase and the rest of the word to lowercase	Proper(str)

PV	financial	Present Value: returns the present value of an investment given a payment num, interest rate num, and num of periods	PV(payment num, interest rate num, num of periods)
Record Count	database	Record Count: returns the number of records in the current database	RecordCount()
Replace	text	Replace: replaces the source str beginning at start position num for num of characters with the replacement str	Replace(source str, start position num, num of characters, replacement str)
Replicate	text	Replicate: repeats a str for num times	Replicate(str, num)
Right	text	Right: returns characters for str beginning from the right and proceeding to the left for num characters	Right(str, num characters)
Round	mathematical	Round: returns the value of num rounded to the specified num of decimal places	Round(num, num of decimal places)
Second	time	Second: returns the second for a given time	Second(time)
Sign	mathematical	Sign: returns the sign of num. A positive num returns 1, zero returns 0, and a negative num returns -1	Sign(num)
Sqrt	mathematical	Square Root: returns the square root of a positive number	Sqrt(num)
Sum	statistical	Sum: returns the total of num1, num2, etc.	Sum(num1, num2, ...)
Time	time	Time: returns the current time as HH:MM:SS based on the current system clock	Time()
Trim	text	Trim: removes leading, trailing spaces, and all other extra spaces from str	Trim(str)
Trunc	mathematical	Truncate: returns the value of num truncated down to the specified num of decimal place	Trunc(num, num of decimal places)
Upper	text	Upper: converts str to uppercase	Upper(str)
Year	date	Year: returns the year number for a given date	Year(date)

Functions Sorted by Type

This section lists each function by type.

Database

Record Count

Date/Time

Date
DayName
DayOfMonth
DayOfWeek
DayOfYear
Hour
Minute
Month
MonthName
Second
Time
Year

Financial

FV
PMT
PV

Logical

If

Math

Abs
Avg
Exp
Int
Ln
Log
Max
Min
Mod
Pi
Round
Sign
Sqrt
Sum
Trunc

Text

Left
Length
Lower
Middle
Position
Proper
Replace
Replicate
Right
Trim
Upper

Chapter 10

Technical Information

This chapter explains how to troubleshoot common problems you may encounter. It also provides technical information on such topics as how to improve Optical Character Recognition (OCR) and scanning performance.

This chapter contains the following sections:

- Before You Begin
- OmniForm Setup Issues
- Scanning and Recognition
- Operation
- Improving Performance
- OmniForm Compatibility
- Error Messages
- Caere Product Support

Before You Begin

If you have a problem with OmniForm, first check that your computer, scanner, and other applications are functioning properly.

Make backups of OmniForm files regularly, preferably in a location other than your hard drive. This could save you hours or days of work if the unexpected happens: file deletion or corruption caused by disk crashes, viruses, or user error.

Try this First

It may help to try one or all of the following:

- Turn off your computer, restart your scanner, and then restart your computer.
- Restart the computer with extensions off to determine if there is a an extension conflict.
- Reinstall OmniForm.

System Setup Checklist

- Make sure that your system meets all requirements as listed in “System Requirements” on page 2-2.
- Make sure that your scanner is plugged in and turned on, and that all cable connections are secure.
- Use the software that came with your scanner to verify that it works properly before using it with OmniForm.
- Fix Macintosh problems before using OmniForm again.
- Run virus-checking software regularly.
- Scan your disk for problems occasionally: use a utility that checks and diagnoses damaged disks and files, such as MacTools™ or Norton Utilities™.
- Defragment your hard disk occasionally with a program such as MacTools or Norton Utilities.

OmniForm Setup Issues

This section contains information on some common installation problems and information on how to optimize the installation process:

Memory and Installation

Close all applications — including screen savers and mail applications — to free up memory before starting the OmniForm setup program.

Linking OmniForm with Visioneer PaperPort™

To link OmniForm with Visioneer PaperPort, locate the `OmniForm Link` file in your `OmniForm Folder`. Drag the file into the `System:Preferences:Visioneer` folder.

OmniForm then appears in the PaperPort Link Bar. For more information on PaperPort links, please see your PaperPort documentation.

Uninstalling OmniForm

Follow these steps to remove OmniForm *permanently* from your system.

The steps listed here remove *all* OmniForm files from your computer. Back up files and records outside your `OmniForm` folder to save them.

1. Delete the `OmniForm Folder`.
2. Delete any OmniForm aliases.
3. Delete the `System:Preferences:OmniForm Preferences` file.

Scanning and Recognition

This section describes common scanning and recognition problems and possible solutions.

System Hang During Scan

A system hang during a scan could have several possible causes:

- A SCSI termination problem.

  Make sure the scanner and any other peripheral devices connected to the scanner are terminated properly. See your scanner documentation.

- A memory-related problem.

  Try closing open windows and applications to free up memory. See “Low Memory” on page 10-5.

Scanner Compatibility

If you experience a problem between OmniForm and your scanner, the scanner may be incompatible with OmniForm. OmniForm requires a scanner with a Pixel Translations ISIS scanner driver.

OmniForm supports image resolutions of 200, 300, or 400 dots per inch (dpi). Select line art, bi-tone, or black-and-white line images for the best results. OmniForm cannot process grayscale or color scans.

Operation

This section provides troubleshooting techniques for potential operational problems as well as additional technical information:

- Low Memory
- Low Disk Space
- OmniForm Limits

Low Memory

Low memory can cause error messages, slow performance, or system hangs. A minimum of 12MB RAM is required to run OmniForm. More is recommended for optimum performance or if you plan to have multiple applications open.

Choose *About This Macintosh...* in the Apple menu to check the amount of free memory. You may need to reconfigure your Macintosh for additional RAM.

The best solution for low memory is to buy and install more RAM. You can increase memory in several other ways as described below: free available memory, allocate additional memory to OmniForm, or use virtual memory.

Freeing Available Memory

Try closing open applications and windows to free up memory. Memory can become *fragmented* if many applications have been open at different times. Try restarting your computer to defragment memory.

Allocating Additional Memory to OmniForm

1. Quit from OmniForm if it is open.
2. Select the OmniForm icon in the OmniForm folder.
3. Choose *Get Info* in the File menu to open the OmniForm Info dialog box.

   The amount in the *Minimum size* box should match the amount in the *Suggested size* box for optimum performance.
4. Change the amount in the *Minimum size* box to the amount in the *Suggested size* box if it is smaller.

5 Type a larger number in the *Preferred size* box if you want to allocate more memory to OmniForm.

The program will use the amount specified if extra memory is available.

6 Close the OmniForm Info dialog box.

Virtual Memory

Check your Macintosh documentation for information on using virtual memory. Virtual memory is hard disk space used temporarily as free RAM by your computer. Performance is significantly slower with virtual memory on.

Low Disk Space

It is recommended that your disk have at least 12MB of free disk space for the best performance. Otherwise, files may be fragmented (that is, written in small blocks in many different places on your disk) which slows the OCR process.

Free up disk space by removing unneeded files or by copying less frequently used files to a floppy disk, an external hard drive, or another storage device.

OmniForm Limits

The following limits apply in OmniForm:

- Pages in a form: 100.
- Open forms: 20.
- Records in a database: 10,000 or approximately 5.4 MB of data across all records.
- Length of *Help* message in an Object Definition dialog box: 100 characters.
- Number of choices in the *List of Choices* list box in an Object Definition dialog box: 100 choices, each up to 100 characters long.

Improving Performance

If you scan typeset, high-quality printed pages, text recognition accuracy should be very high.

With lesser-quality pages, however, text recognition may not be as accurate. This section discusses a number of factors that affect scanning and recognition performance:

- Document Quality
- Scanning Angle
- Scanner Glass Cleanliness
- Paper Transparency
- HP AccuPage

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: 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. Even if you use the *Auto Form Straightening* option, it is possible for the page to be too skewed for OmniForm to design it properly. Adjust the page and rescan it if you see numerous recognition errors due to skewing.

Scanner Glass Cleanliness

The sheet of glass on the flatbed of the scanner must be clean. 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. To correct this problem, put a dark-colored piece of paper behind the page between the page and the lid of the scanner.

HP AccuPage

HP AccuPage is a technology developed and licensed by Hewlett-Packard. It improves the combined performance of the HP ScanJet scanner and OmniForm.

To use HP AccuPage with OmniForm, you must have an HP ScanJet Plus scanner or above. Use AccuPage to:

- Improve the recognition of forms printed on colored or shaded backgrounds, or on smudged paper.
- Improve the recognition of forms with very small type.

To select HP AccuPage for scanning:

1. Choose *Scan Form...* in the File menu.
2. Click *Set Up Scanner...* in the Scan Form dialog box.
3. Select *Auto (AccuPage)* and click *OK.*
4. Continue to scan as you normally would.

OmniForm Compatibility

This section provides OmniForm compatibility lists.

Database Information Exchange

OmniForm can exchange information with the following databases:

- Macintosh and PC OmniForm Database files
- comma- or tab-separated text files

Graphic Formats

OmniForm can import the following file types into a graphic object or a fill graphic field:

- TIFF
- PICT
- GIF
- JPG

Image File Formats

OmniForm can import and recognize black-and-white forms in either PICT or TIFF format. Image resolution must be 200, 300, or 400 dots per inch (dpi).

Scanners

If you plan to scan forms, you need a scanner with a Pixel Translations ISIS scanner driver.

OmniForm Forms

OmniForm can open OmniForm forms created in any version of OmniForm for Windows. Make sure you select *All Files* in the *List Files of Type* pop-up menu in the Open dialog box. Otherwise, only forms created on the Macintosh will be displayed. The same is true for opening Macintosh OmniForm forms in OmniForm for Windows.

OmniForm Data Files

You can import Data files created in the Windows version of OmniForm. Use PC Exchange to map the .ofm PC extension to the appropriate Macintosh 'OFD' filetype.

To import a Macintosh Data file into the Windows version of OmniForm, you must add an OFD extension to the file name; for example, `Form 1 DB.ofd`.

Error Messages

Where possible, OmniForm error messages attempt to pinpoint a problem and offer a solution. Sometimes one solution may not work or there may be more information that does not fit into the dialog box.

Many calculation errors are the result of improperly constructed calculations. See “Calculation Guidelines” on page 9-7 for detailed information.

Low Memory or Disk Space Errors

If an error message contains the instruction “Close open windows and applications to free up memory” see “Low Memory” on page 10-5. If an error message says you are low on disk space, see “Low Disk Space” on page 10-6.

Scanner Errors

If a scanner error message appears, make sure:

- The scanner is turned on.
- Scanner connections are secure.
- The scanner is not in use by another application.
- Your scanner is compatible with OmniForm. You need a scanner with a Pixel Translations ISIS scanner driver.

Test your scanner with the manufacturer’s software to make sure that it works properly. Check Caere’s Web site for updated scanner drivers. See “Caere Product Support” on page 10-13 for more information.

Other Error Messages

The following messages are listed alphabetically.

All objects within an Option Group must be of the same type.

An Option Group can consist of circle text objects or check box objects. OmniForm does not allow the same Option Group name to be assigned to different object types.

Calculation Error: Cannot resolve circular references.

This message appears if two or more fields are logically connected in a closed loop so that no value can be returned. For example, suppose you selected the field *Cost1* and created this calculation for it:

```
Sum([Cost1];[Cost2])
```

A circular reference error message would appear because the selected field cannot be involved in returning its own sum.

Calculation Error: Invalid Field Name ([field name]). Correct the field name or enter another in the expression for [field name].

A field name in your calculation does not exist in the form. It may be misspelled or it may have been deleted from the form after the calculation was previously accepted. Correct the field name, add it to the form if it is missing, or change the calculation.

Calculation Error: Invalid Field used in calculation. [field name1] cannot be used in the Expression for [field name2].

You used an invalid field, such as a fill graphic, in a calculation. Only fill text, comb, check box, and circle text fields can be used in calculations.

Calculation Error: Missing ']'.

The calculation is missing a bracket. All field names that contain a space must be enclosed by brackets. OmniForm does not automatically insert brackets around a manually created field name that contains a space. You must enter brackets for it manually.

Calculation Error: Missing '('.

The calculation is missing a left parenthesis. (The same message with a right parenthesis appears if that is missing.) Parentheses must enclose an entire function.

It is easy to leave out a parenthesis in a long, manually created calculation containing multiple functions. Try using the Calculation Builder instead so that OmniForm inserts parentheses automatically. See Chapter 9, Using Calculations, for more information.

Scrap Album error. Try freeing up hard disk space, and close open forms and applications to free up memory.

If disk space or memory is not low, this message may appear because the Scrap Album file you selected is missing or corrupted. A Scrap Album file moved or deleted from the `OmniForm: Scrap Albums` folder while OmniForm is open will still appear in the *Scrap Album* pop-up menu. If you select it, this message appears.

Restart OmniForm to update the list of Scrap Albums if you delete a Scrap Album file from the hard drive.

The current word cannot be added to the dictionary because it contains invalid characters.

The word contains a character such as a caret (^) that OmniForm does not allow in the dictionary.

The name you entered contains invalid characters. Please enter a valid name.

A field name can contain only letters, numbers, the underscore character (_), and spaces.

This form is protected. Turn off form or data protection to make changes.

Form and/or data protection is active. See “Protecting Your Database” on page 8-26 for detailed information.

Caere Product Support

Product support is available if you need help. First, please check this manual to find the information you need, or look in the online help if you can run OmniForm. You may save yourself a phone call.

World Wide Web

Caere's home page is located at:

`http://www.caere.com`

Our Web site contains product information, lists of common questions and answers, the latest release notes and online help files, and all known issues regarding Caere products.

Product Support Information

Your OmniForm package contains two pages with the most up-to-date support information for the United States, Canada, and the European Community. Please refer to these pages if you need product support.

Registered users in North America can call Caere Product Support at 408-395-8319.

You must be registered to receive product support! Complete and send in the registration card in your OmniForm package. If you need to call before registering, please have your serial number ready.

Information We Need From You

For the most efficient response, please have the following information on hand and be near your computer if you call:

- OmniForm serial number
- OmniForm version
- Macintosh model
- System version
- Network operating system, if applicable
- Scanner manufacturer and model
- Amount of RAM in your system
- Make and model of any peripheral devices (printers, monitors, and so forth), if applicable

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