

README - FormIDEA for Microsoft Excel 97 Evaluation Version

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About FormIDEA for Excel 97 Evaluation Version

FormIDEA is a *Form Image Document Enabled Add-in* for Excel, which enables you to convert paper-based form documents into electronic workbooks and manage them with the combined power of FormIDEA and Excel.

FormIDEA is also an intelligent *Form Image Data Entry Assistant*, which helps you to capture data from scanned or faxed forms and store or transfer them in electronic formats using Excel.

The *FormIDEA for Excel 97 Evaluation Version* is a fully functional module built for several included sample forms. Before you decide to use the product, you might want to try out the completed application. This evaluation version will help you, from a user's point of view, appreciate FormIDEA functionality in a real integrated environment in Excel.

To process other forms, you need to use the *FormDefine* module to create an individual reference form (.ref file) for each additional form type, then you can use the *FormIDEA for Excel 97* to perform the same tasks as you can do with this evaluation version on the sample forms.

System Requirements

The following Microsoft products must be installed in your system to run the FormIDEA for Excel 97:

- Windows 95/98 or NT 4.0
- Office 97 or Excel 97

Installing FormIDEA Add-in Module

1. Quit Excel 97.
2. Double-click the *FormIdea.exe* file you downloaded to extract (unzip) the program files. (if the file you downloaded is a .zip file, *FormIdea.zip*, then use a common unzip program to manually extract the program files).
3. Run the *Setup.exe* program and follow the on-screen instructions.

Sample Forms

There are four sample form types (App/Fax/Info/Csv) included in this evaluation version. Each form type has a predefined reference (.ref file) and several user filled-in document forms (.tif files). These sample forms are located in the following directories:

Pre-defined reference forms:

*<FormIDEA InstallDir>\Reference\App.ref ,
Fax.ref ,
Info.ref ,
Csv.ref*

User filled-in document forms:

*(10 application forms)
<FormIDEA InstallDir>\Forms\AppForm\App301.tif , ...
App310.tif*

*(10 fax forms)
<FormIDEA InstallDir>\Forms\FaxForm\Fax201.tif , ...
Fax210.tif*

*(10 info forms)
<FormIDEA InstallDir>\Forms\InfoForm\Info201.tif , ...
Info210.tif*

*(10 course survey forms)
<FormIDEA InstallDir>\Forms\CsvForm\Csv301.tif , ...
Csv310.tif*

You need these forms to run the FormIDEA evaluation application. Please note that the CSV sample survey forms are specially provided to demonstrate batch

mode processing for automated survey data capturing.

Previewing FormIDEA with Sample Forms

The following steps will guide you to start FormIDEA with pre-installed sample forms. For detailed descriptions for each operation, please refer to the online *FormIDEA Help* file (located in your *FormIDEA* installation folder).

- Loading a Reference Form

- Select the *Image Data Entry Assistant...* menu item in the Excel Tools menu. This will activate the FormIDEA add-in toolbar.
- Select *New...* in the *Start* menu on the FormIDEA add-in toolbar. In the opened file dialog box, locate one of the pre-defined sample reference forms, e.g.:

<FormIDEA InstallDir>\Reference\INFO.ref

then click *Open*. The FormIDEA *Form Document Server* will be launched, which shows the sample reference form you selected, together with a new workbook opened in Excel.

- Processing Forms in the Default Contiguous Mode

Once the reference form has been loaded, it can be used to process document forms of the same type. To start processing, you should perform the following steps:

- Click the *Process* button in the FormIDEA add-in toolbar. In the opened file dialog box, select a document form of the same type as the reference, e.g.:

<FormIDEA InstallDir>\Forms\INFOForm\INFO201.tif

then click *Open*. The form you selected will be loaded for processing. You will notice that all check boxes are automatically recognized and interpreted by the build-in OMR (optical mark recognition) engine.

- Position the cursor to an entry you'd like to key in or verify data. The data image auto-tracking feature will help you to fast key in what you see on the screen.
- Move the cursor to the next row then click the *Process* button (or press the **Alt - p** key) again. In the default *Contiguous* mode, this will load the next

form (e.g. *INFO202.tif*) for processing.

- Repeat the last step above (i.e. move the cursor to the next row and press **Alt - p** key) to process the next form in the same directory.

- Processing Forms in Batch Mode

Batch mode processing is specially useful for capturing data from survey forms that have a lot of check boxes. You can perform the following steps to process forms in batch mode:

- Shut down the Form Document Server to stop processing the previous form type. This can be done by closing the workbook or clicking *Shut Down* in the Start menu.
- Click *New...* in the Start menu on the FormIDEA add-in toolbar and load the pre-defined course survey reference form:

<FormIDEA InstallDir>\Reference\CSV.ref

- Select the *Batch* mode in the drop-down list on the FormIDEA add-in toolbar.
- Click the *Process* button and open the first survey form

<FormIDEA InstallDir>\Forms\CSVForm\CSV301.tif

in the file dialog box. This will bring up the batch processing dialog and start batch processing. You will notice that the survey data (marked bubbles) on each form are automatically recognized and transferred into the Excel work sheet.

- Retrieving, Reviewing Form Documents or Verifying Data Entry

You can verify data entry results or review form image documents for any recorded rows on the form sheet by performing the following steps:

- Select the *Review* mode in the FormIDEA add-in toolbar.
- Move the cursor to a row where you would like to verify the data or retrieve the form image document for review, then click the *Process* button. The form image document associated with that row will be retrieved.
- Move cursor from entry to entry on that row to verify or review data with displayed data images.

Uninstalling FormIDEA Add-in Module

1. Drop (unload) the FormIDEA Add-in module from Excel, i.e. select the *Add-ins...* menu item in the Excel *Tools* menu, uncheck the *formidea* and click *OK*.
2. Go to the Windows *Start/Settings/Control Panel* and click the *Add/Remove Programs*. In the *Install/Uninstall* folder, select the *FormIDEA for Microsoft Excel 97* then click *Remove*.

Contacting TechVision

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