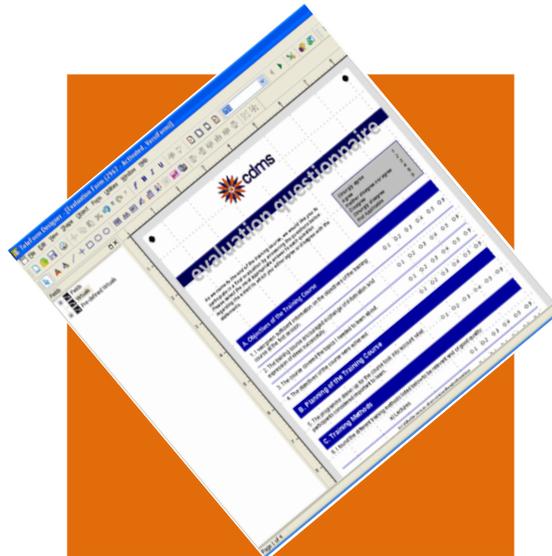


Workshop on Census Data Processing

TELEform Designer User Manual



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Teleform Modules

Teleform consists of seven main programme modules: Designer, Automerge Publisher, ScanStation, Reader, Verifier, Remote Capture Station and Web Capture Option. Each of these serves a distinct function and each has its own icon in the Teleform programme group.

Teleform Designer Module

Teleform Designer allows you to:

- create and edit forms
- scan and configure existing forms
- set form attributes and export options
- define data validation options
- import and export forms
- print forms and write scripts
- specify image processing
- create detail groups
- design dropout forms (forms that use dropout ink)

FORM TEMPLATES

TeleForm makes use of 3 distinct types of Information Templates, namely Form Templates, Document Templates and Package Templates. The template you will be using is the Form Template.

A Form Template is a structured form that can be automatically identified by the software's TeleForm Reader module. It makes use of strictly defined data entry fields that can be automatically evaluated by TeleForm Reader. The template includes a variety of rules that determine how it will be processed, including rules for how form information will be saved. This template is the form that will be used in the field, completed and returned to be scanned into Teleform to obtain the information collected on it.

Available Form Templates

When building a Form Template in Designer, you can choose from three styles:

Traditional – These Form Templates are created completely within TeleForm Designer. Visually, they have four square "cornerstone" Reference Marks and a fixed Form ID block.

You cannot change the appearance of the Reference Marks or the Form ID block, but you can move the Form ID block between the upper left and lower right corner. You can also place the Form ID block in both locations.

TeleForm Reader uses these marks and blocks to:

- identify an image file as a Form Template
- locate the Form Template's data entry fields

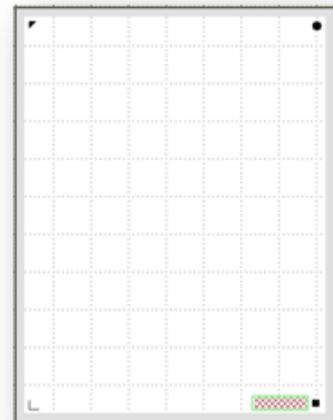
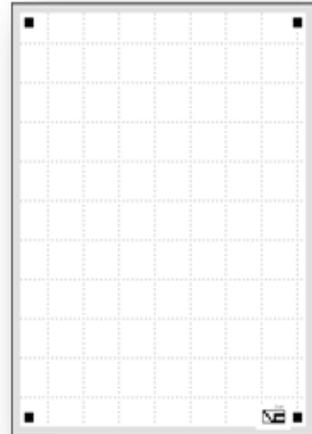
VersiForms – These Form Templates are created completely within TeleForm Designer. Visually, they contain Reference Marks and a Form ID feature, like Traditional Form Templates. Also like Traditional Form Templates, these marks and Form IDs are used to identify images as the Form Template and locate the data entry fields on it. However, VersiForm Templates allow you more flexibility in visual design.

You can edit both the size and appearance of the Reference Marks on VersiForm Templates. You can create square, circle, triangle, and angle Reference Marks. Although you cannot delete or obstruct the Reference Marks, you can move them to different places on the page. For multipage templates, each page can use different Reference Mark styles and locations.

You can choose between a text and bar code Form ID, and place it in any of the four corners of the template.

Existing – These Form Templates are forms that were first created outside of TeleForm. They might be time cards that your company has used for years before you purchased TeleForm, marketing surveys created in a sophisticated graphics design program, or any other data-gathering form that is not currently automated. Visually, there is no standard appearance for Existing Form Templates.

To incorporate an Existing Form Template into TeleForm, you must have either a hard copy or an electronic image of the form created by the same scanner that you will use to process returned forms. If you have only the hard copy, you must create an image of the document using the same scanner that you will use to process returned forms.



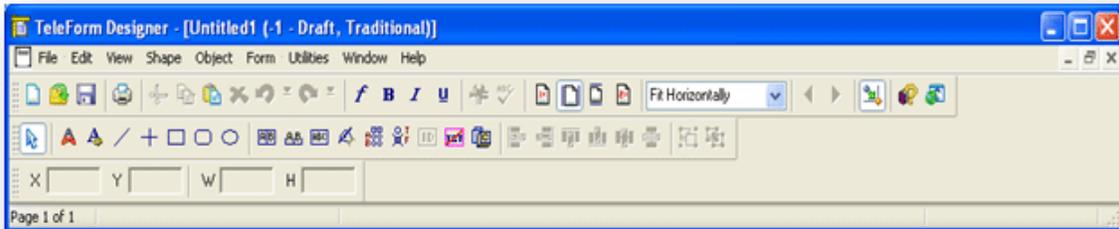
After opening the form image in Designer, you will overlay the existing data entry fields with TeleForm data entry fields. Unique drawing objects and text blocks will be used as the equivalent of Reference Marks. You can also use unique text on the page to create an Explicit ID to assist Reader in identifying the Form Template.

After your form has been converted, Reader will be able to evaluate images of the Existing Form Template, since Reader now "knows" where the data entry fields are located and what type of values should be expected in them.

THE DESIGNER WORKSPACE

The Designer workspace is a computerized pasteboard on which you create and configure your form template. It comprises the following features.

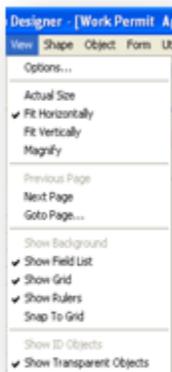
- a. **Toolbar Buttons** – these provide shortcuts to commands that are also available from the menus.



- b. **Status Bar** – this is located at the bottom of the Designer window. It shows:
 - the number of the page you are currently working on;
 - the position and size of the currently selected object;
 - the type of object that is currently selected.



- c. **Field List** - This window lists every Data Entry Field, Index Field, and Virtual Field on your template, including those on pages that aren't currently shown in the design window. The **Show Field List** command on the **View** menu and the **Toggle Field List** button allow you to control whether the Field List appears for a specific template. By double-clicking a field in this list, you can open that field's **Properties** dialog box.



- d. **Grid and Object Layout Options** – These options apply only to Form Templates. You can control how your grid and the objects on it will appear by changing the settings in the **View Options** dialog box. To open this dialog box, click the View menu and select Options. The settings on the View Options dialog box apply only to the Form Template that you are currently viewing. Therefore, you can modify them independently for each Form Template. You can also change the default View Options and apply your changes to all future Form Templates by clicking Save Default Settings on the Form menu.

- e. **Data Entry Fields** – Designer allows you to create the following types of Data Entry Fields. Each field can be customized in terms of appearance and function to meet your exact data collection needs.

Constrained Print Fields - These fields are excellent for gathering data such as names, dates, and numeric figures. The vertical lines or boxes act as guides for the person filling out the form.

Choice Fields – These fields consist of a single column, or row, of options. Although the choices may be simple, such as "Blue," you can export detailed values based on what option is selected. Choice Fields can be designed to accept a single choice per field or multiple choices.

Entry Fields – Entry Fields can consist of one or more columns, or rows, of identical choice options, each being restricted to the selection and storage of single characters in a particular range, such as A-Z and 0-

9. When you select an "A" from an Entry Field column, an "A" is written to the database in that position. Only one valid choice can be selected per column.

Capture Zones – These features allow a Verifier operator to find information on a form image or an image of an attachment and manually enter that data.

Image Zones – This feature captures a wide range of data, including bar codes, signatures, written narrative responses, and even numeric or name data that does not lend itself to a Constrained Print Field.

Signature Fields – These fields are similar to Image Zones, but TeleForm will not perform recognition on the data collected in a Signature Field. You can configure these fields to calculate the fill percentage to determine whether the form was signed or not, however. If you are using the TeleForm e-Form Option, you can use these fields to collect digital signature for online PDF forms.

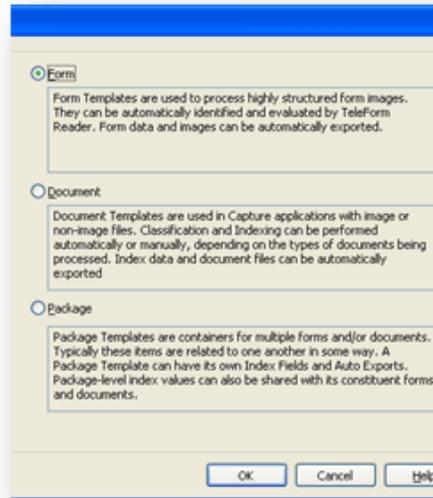
HOW TO CREATE A FORM TEMPLATE

The main purpose of form processing is to capture information quickly and efficiently. The type of information to be collected and who the form recipients are should determine the design of the form. Questions to consider when planning the design of a form include:

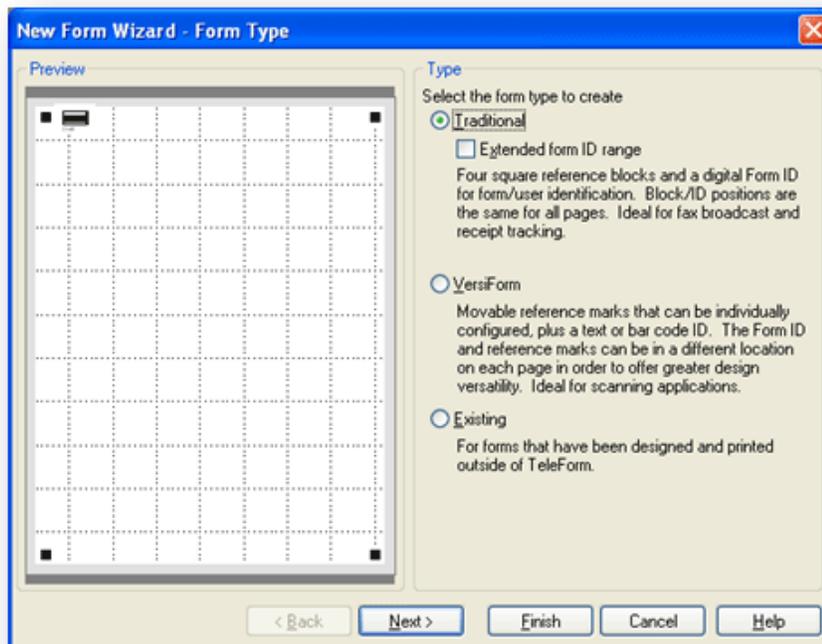
- the type of Form Template best suited to the information to be captured
- size limitations of the form
- the inclusion of graphics such as a logo or picture
- the inclusion of instructions in the body of the form
- the type of data entry fields best suited to capture the relevant data

Setting Up a Form Template

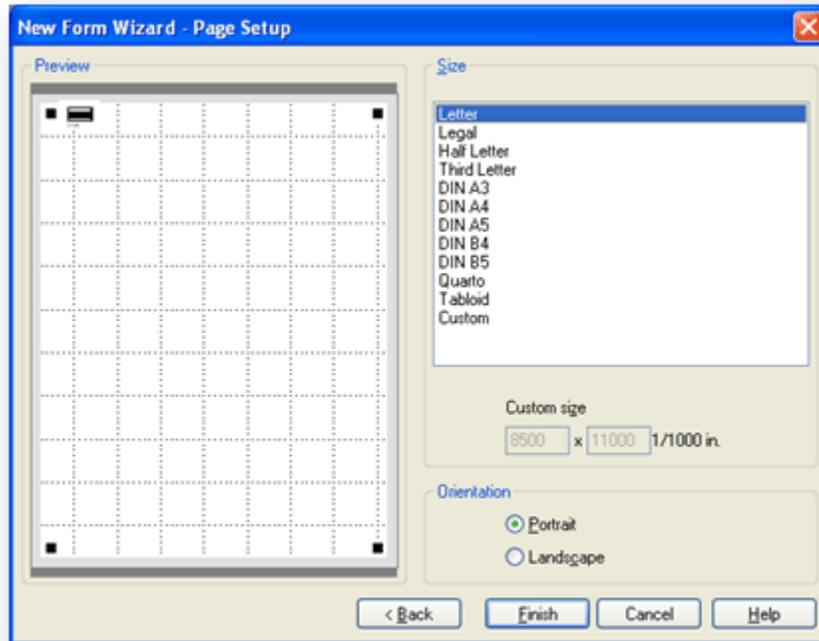
1. Open Teleform Designer. Under File on the menu bar, select New.
2. A window indicating three types of templates is presented. Select the first choice (Form) and click OK.



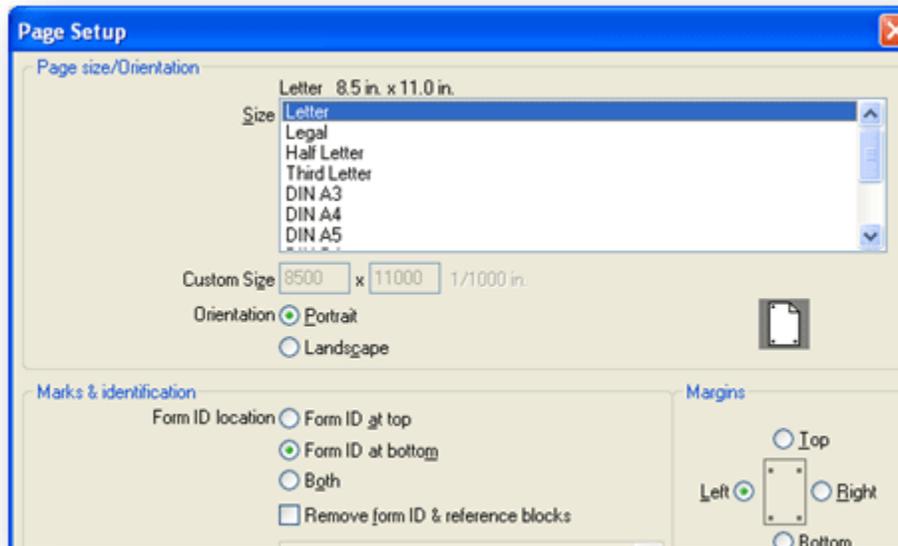
3. A Form Type window appears indicating three types of forms with the corresponding preview on the left. Select either Traditional or Versiform and click Next.



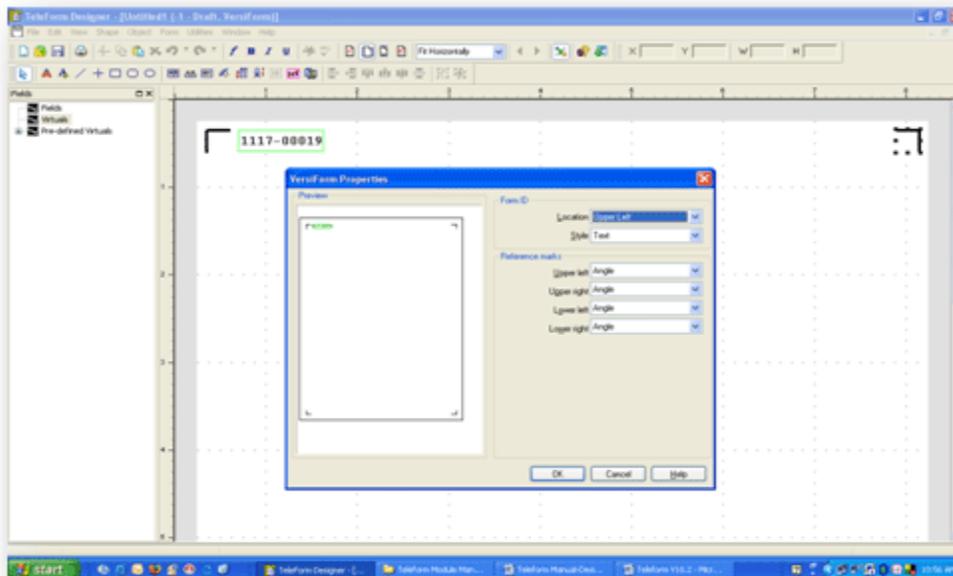
4. A page set up window appears. This window displays the different sizes of paper that can be selected for the form as well as the page orientation. Select the appropriate size and orientation and click Finish.



5. The four marks located at the four corners of the form are Reference Marks and the block located at the top left hand corner is the Form ID block. Teleform Reader uses these marks and blocks to identify an image file as a Form Template and locate the Form Template's data entry fields. If you are setting up a Traditional Form Template, you cannot change the appearance of the Reference Marks or the Form ID block, but you can move the Form ID block between the upper left and lower right corner. To do this, select Page Set Up located under Form on the menu bar. Under Marks and Identification, select the appropriate Form ID location.



If you are setting up a Versiform Form Template, you can change the appearance of the Reference Marks or the Form ID block, as well as move the Form ID Block to any of the four corners of the Template. To do this, right click on the Form ID Block or one of the Reference Marks and select Properties. Under Form ID, choose the preferred location and style of the ID Block and choose the preferred style of the Reference Marks from the drop-down list provided. The Reference Marks can also be moved within the four quadrants of the Form Template.

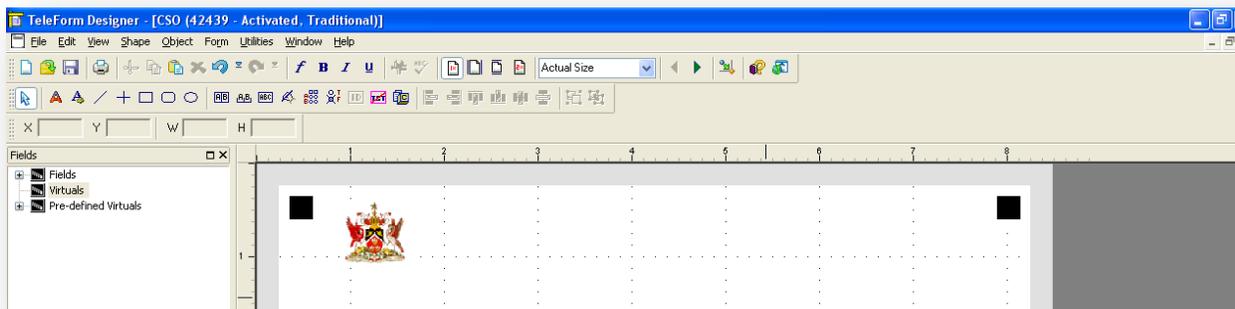


PLACING SHAPES AND IMAGES ON A FORM TEMPLATE

Designer's **Shape** menu and the Shape toolbar allow you to add objects to a Form Template.

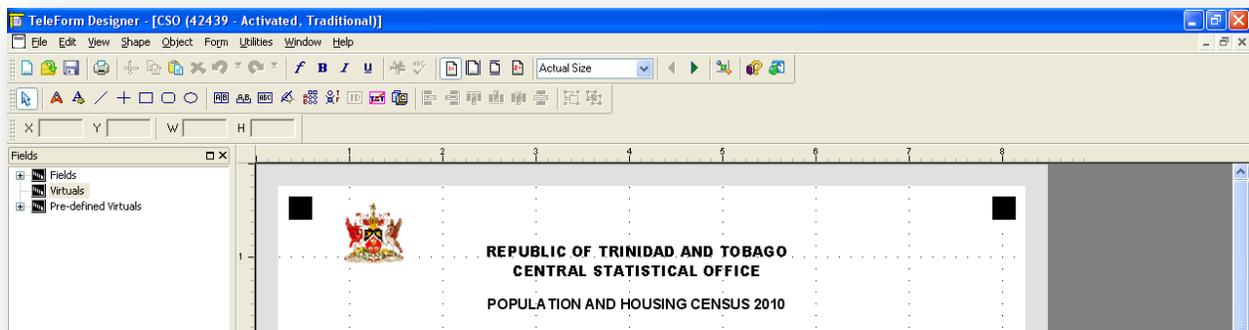
1. Select an object from the **Shape** menu or click the appropriate toolbar button. The cursor will reflect the shape you selected. Hold down the left mouse button and "drag" the cursor to define the size of the shape.

Jpeg and Tiff images can be copied from MS Paint or Photoshop and pasted onto the form being designed, and the size adjusted as necessary.



PLACING TEXT ON A FORM TEMPLATE

1. The text tool is located on menu bar. When selected, you drag the cursor over the area on the page where you want to type text.
2. Text font, size and alignment can be adjusted by highlighting the text and selecting the desired options under Object on the menu bar. Use Caps Lock on your keyboard to type text in uppercase.

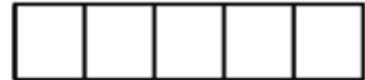


CONSTRAINED PRINT FIELDS

Types of Constrained Print Fields

Constrained Print Fields, also known as Print Fields, provide one dedicated space for each letter, number, or character in the response. Each space is bounded by lines to guide the respondents in correctly entering data in the assigned spaces. There are three types of Constrained Print Fields:

Standard Fields consist of sequential boxes.



Comb-Style Fields consist of short lines between each character. You can modify the height of the comb lines.

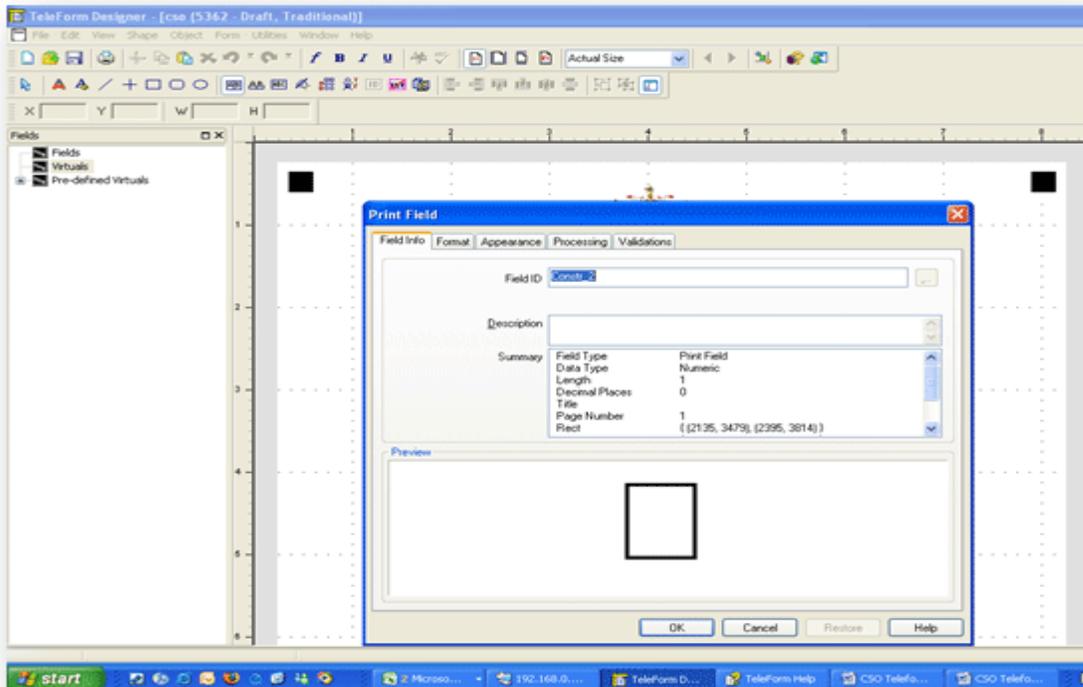


Date Fields can be either full boxes or comb-style in appearance, but they include separator characters, such as a slash / or dash -, to distinguish between the day, month, and year information. Date Fields are automatically limited to numeric characters.



How To Create A Constrained Print Field

1. Click the **Constrained Print Field** or **Comb-style Constrained Print Field** toolbar button located on the menu bar. You can also select, **Constrained Print** from the **Shape** menu and click **Standard**, **Date**, or **Comb**. The cursor will change to the **Constrained Print Field** tool.
2. When you release the mouse button, the **Constrained Print Field** dialog box will appear.



Configuring the Print Field Tabs

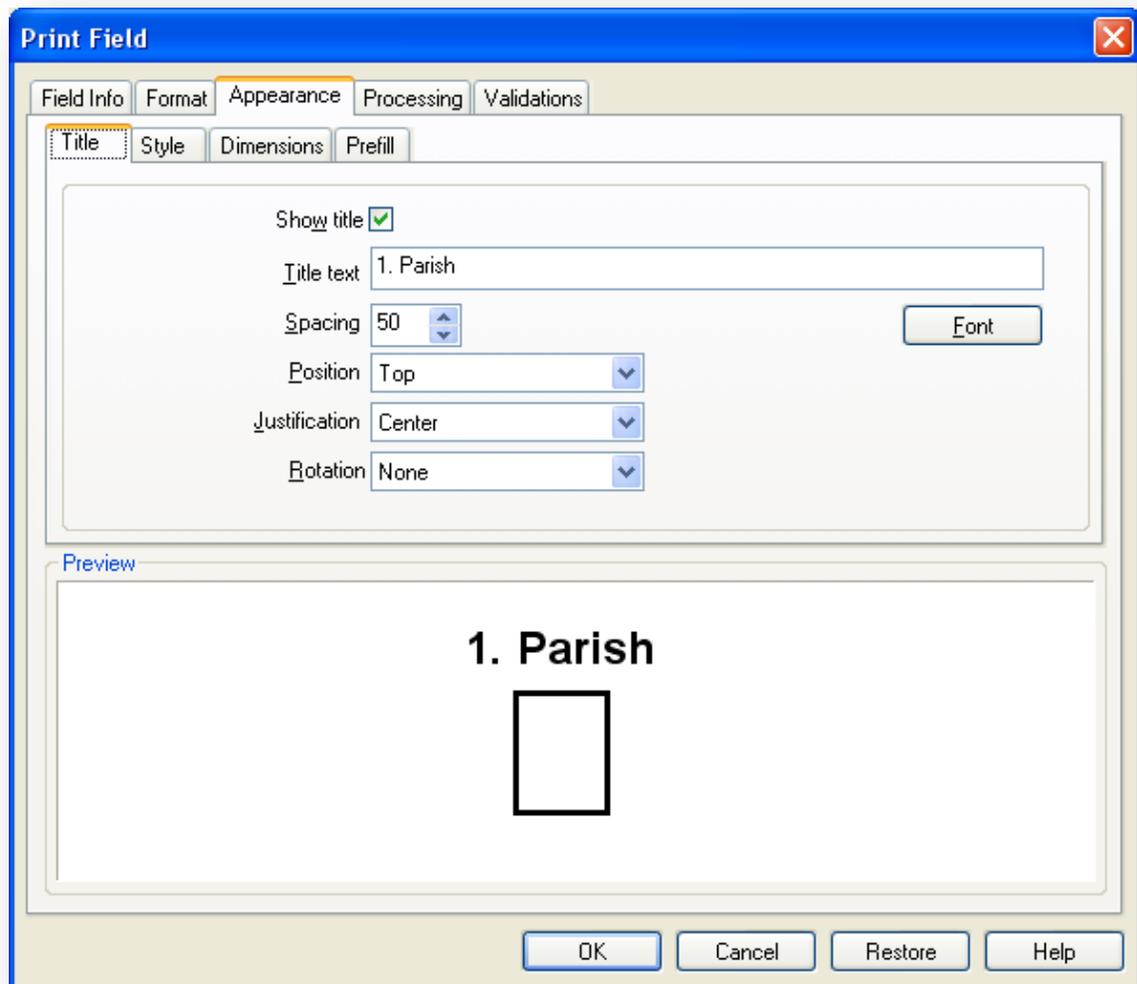
The **Field Info Tab** consists of the following features:

- **Field ID** – Teleform automatically assigns a default **Field ID** to each new field you create. You can replace the default with a more descriptive ID that is relevant to the data you will be collecting. The **Field ID** can be up to 127 characters. Underscore characters (_) will be added if you type a space.
- **Description** – this field is optional. There is no limit to the length of the **Description**.
- **Summary** – this window displays an overview of the data entry field as it is currently configured.
- **Preview** – this window shows the physical appearance of the data entry field as it is currently configured.

1. Type a Field ID in the Field ID box.

Adding a Title to Data Entry Field

1. Click the Appearance tab on the data entry field's Properties dialog box and select the Title sub-tab. If necessary, type a new name in the Title text box.
2. Make sure the Show title check box is selected.
3. The Spacing setting determines how far the Title will be printed from the border of the field.
4. The Position, Justification, and Rotation settings change the appearance of the Title relative to the field.
5. To change the text style of the title, click Font.
6. Click OK.

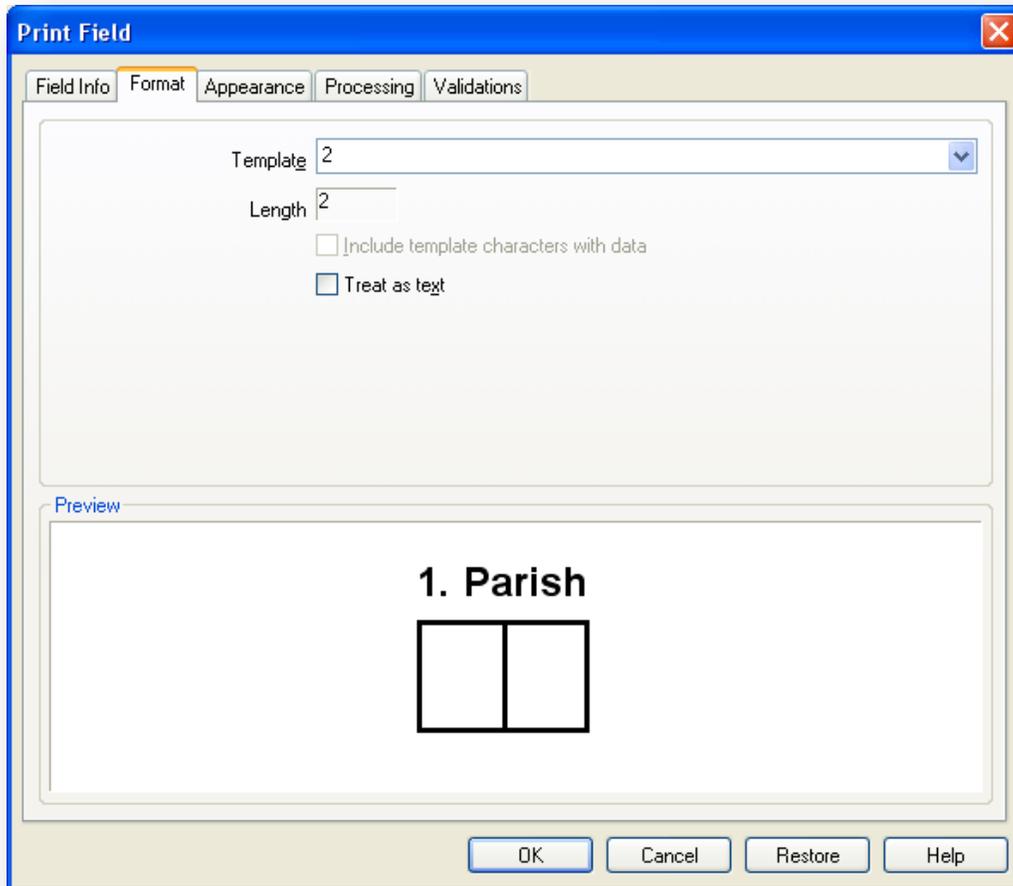


Constrained Print Field Format

The size of a Constrained Print Field is limited only by the page size of the form.

The Template Field defines how many "boxes" will make up the Constrained Print Field.

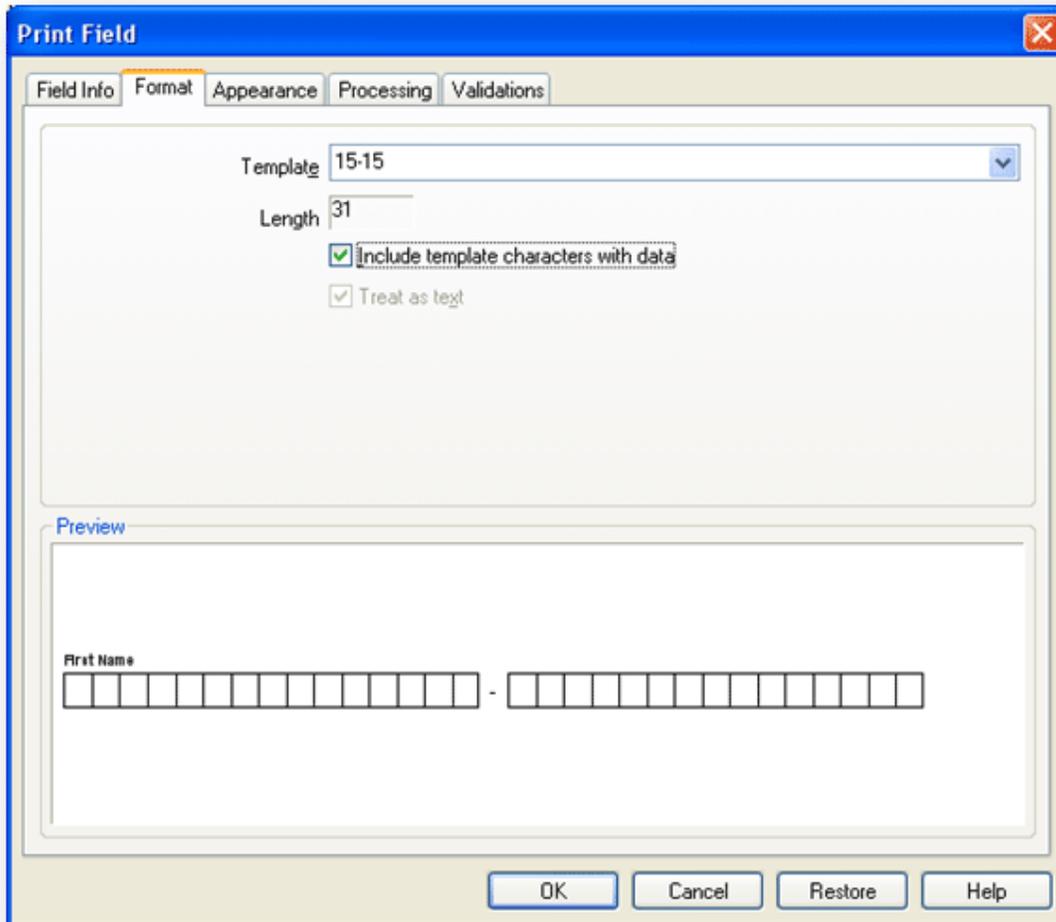
1. Type a numeric value in this field. The Constrained Print Field will contain that many "boxes."



The screenshot shows the 'Print Field' dialog box with the 'Format' tab selected. The 'Template' field is set to '2' and the 'Length' field is set to '2'. There are two checkboxes: 'Include template characters with data' (unchecked) and 'Treat as text' (checked). The 'Preview' section shows the text '1. Parish' above two empty boxes. The dialog box has buttons for 'OK', 'Cancel', 'Restore', and 'Help'.

The Length Field shows the maximum number of characters that will be exported from the Constrained Print Field after the form is evaluated. If the Include template characters (/ \$. -) with data option is NOT enabled, the Length will match the number of "boxes" defined in the Template Field. If the Include template characters with data option is enabled, the Length will equal the number of "boxes" defined in the Template Field PLUS the number of template characters used for the field. For example, the Template below includes two separator characters (slashes). Once the Include template characters with data option is selected, the Length of characters to be exported will be eight as opposed to six.

The Treat as Text option causes data to be exported as text rather than as numbers. This option is enabled automatically for fields that are defined as alphabetic or alphanumeric. It can be manually selected when the expected characters are numeric, or when you have defined a numeric Template.



Processing Options – Recognition Tab

Recognition settings define the characters that TeleForm Reader will "expect" to find in Constrained Print Fields. Defining the expected characters more narrowly will typically improve recognition, but if you disable TeleForm from recognizing certain characters or print styles, you risk losing information should a form be filled out in a non-allowed method.

Expected Characters – the AlphaNumeric option provides the greatest flexibility in evaluating returned data. However, you can narrow the expected characters and increase recognition accuracy by selecting

either Alpha or Numeric, as long as you are confident that the returned fields will ALWAYS contain only alphabetic or numeric characters.

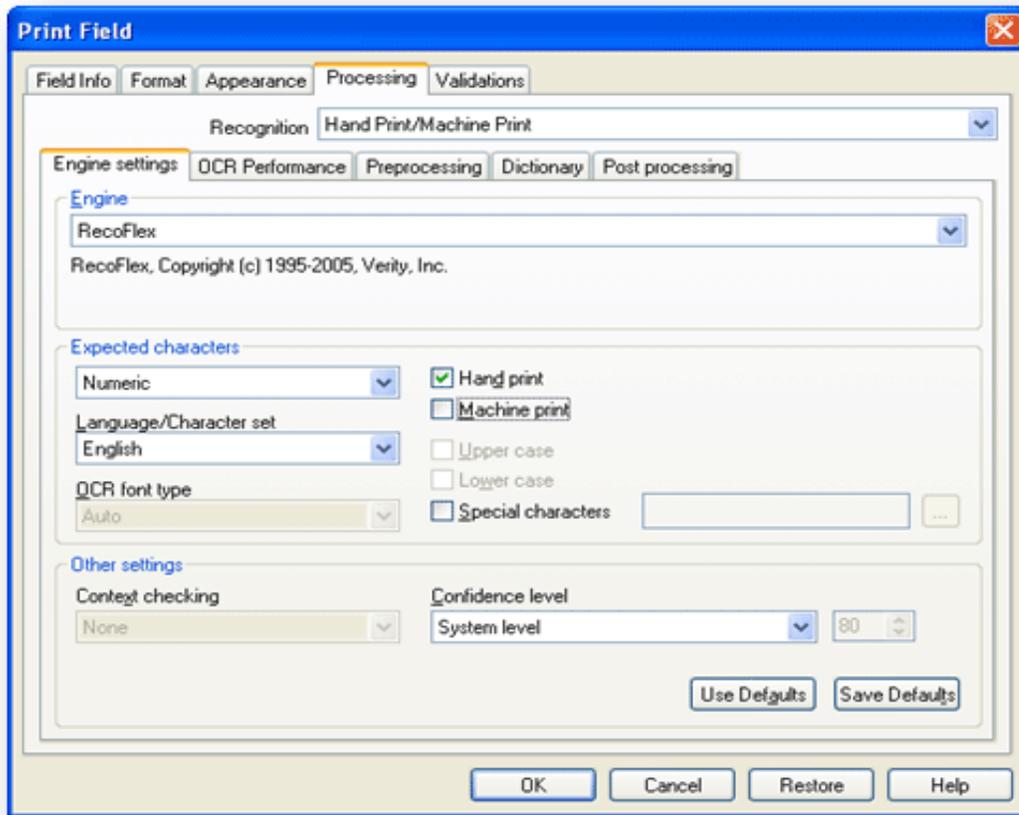
You can also specify the location of alpha or numeric data in a field by placing “a” or “n” after the numeric value typed in the Template Field. For example, if you type 3a3n in the Template Field, the Reader will expect to find three alpha characters in the first three boxes followed by 3 numeric characters in the last three boxes.

Hand Print and Machine Print – You can select either or both of these options. **Hand print** allows Reader to recognize printing done by hand. **Machine Print (Default)** allows Reader to recognize printing done by typewriter, printer, or other mechanical source.

Upper Case and Lower Case – the **Upper** and **Lower case** check boxes are only available if you have selected Alpha or AlphaNumeric from the **Expected characters** list.

- **Upper case** (Default): If you are certain that the returned value for the field will contain only upper case letters, you can select this check box and disable **Lower case** to narrow the expected characters and increase your recognition accuracy.
- **Lower case** (Default): If you are certain that the returned value for the field will contain only lower case letters, you can select this check box and disable **Upper case** to narrow the expected characters and increase your recognition accuracy.

Special Characters – to enable the recognition and/or display of special characters in a Constrained Print Field or Image Zone, you must select the **Special Characters** checkbox. By default, any field on which **Special Characters** is enabled will support ALL the special characters available for the selected **Expected characters** and printing style options. You can further define exactly which special characters will be supported by checking the Special Characters dialog box.



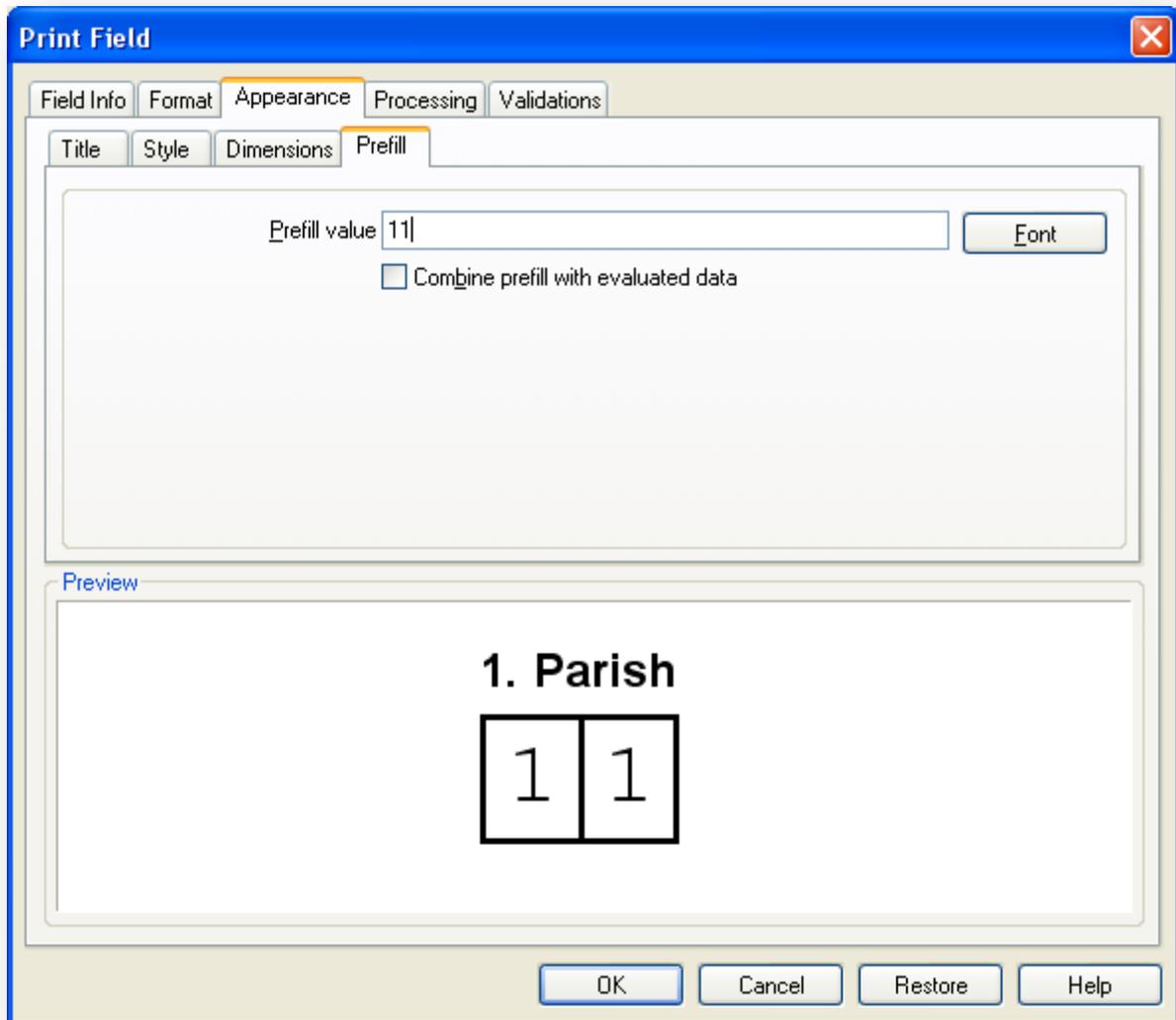
Prefill and Default Values

Prefill values let you automatically place information in a data entry field.

Default values let you specify a value that will be exported from the data entry field in the event that field is returned completely unfilled.

To prefill a data entry field:

1. Make sure the Expected Characters option in the Engine Settings is configured to accept the type of data with which you will be prefilling the data entry field, i.e. whether numeric, alpha, or alphanumeric.
2. Open the data entry field's **Properties** dialog box.
3. On the **Appearance** tab, click the **Prefill** sub-tab
4. Type a value inside the **Prefill value** box.
5. Click OK.



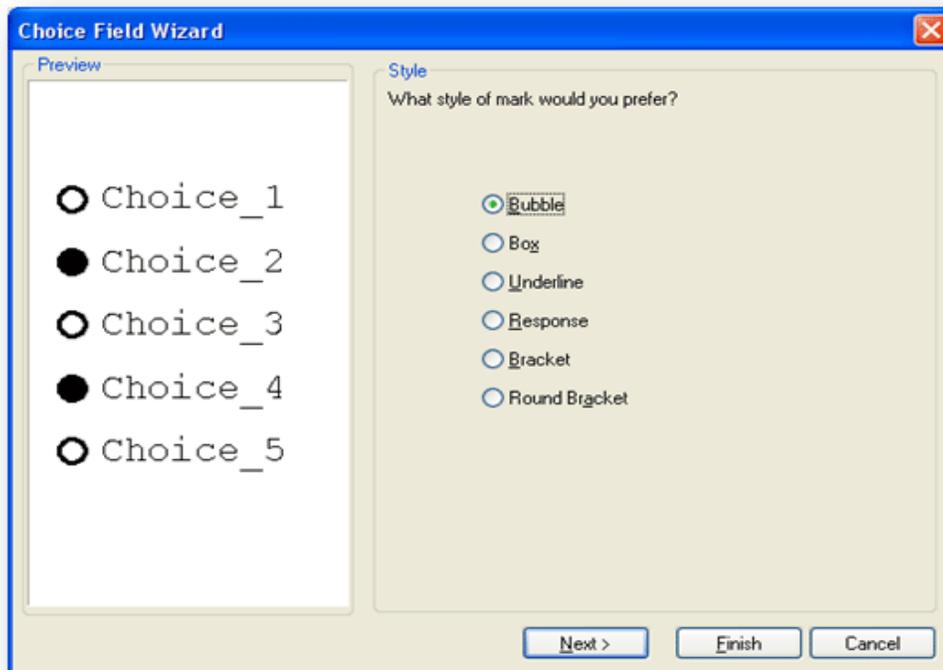
Once all appropriate selections have been made to suit the requirements of the **Constrained Print Field**, click OK. Your Form Template will now display the configured **Constrained Print Field**, which can be positioned on the form as desired. The **Field ID** will also be displayed under the **Fields** icon on the left side bar.

CHOICE FIELDS

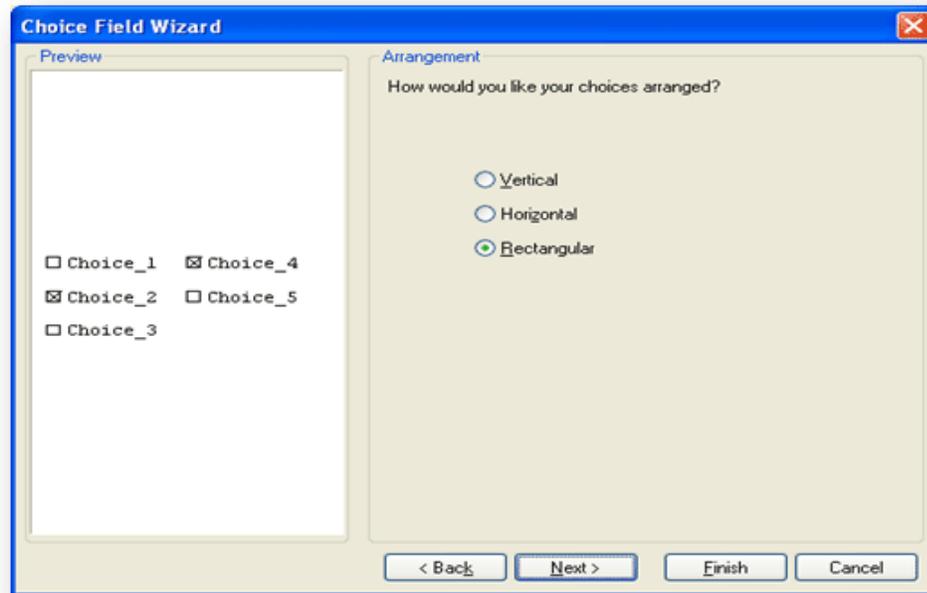
Choice Fields are a list of options. The respondent chooses from these options by selecting the appropriate Response Mark. The available types of Response Marks include bubbles, boxes, brackets, lines, and the name of the option. Choice Fields can also be designed to accept a single choice or multiple choices.

How To Create Choice Fields

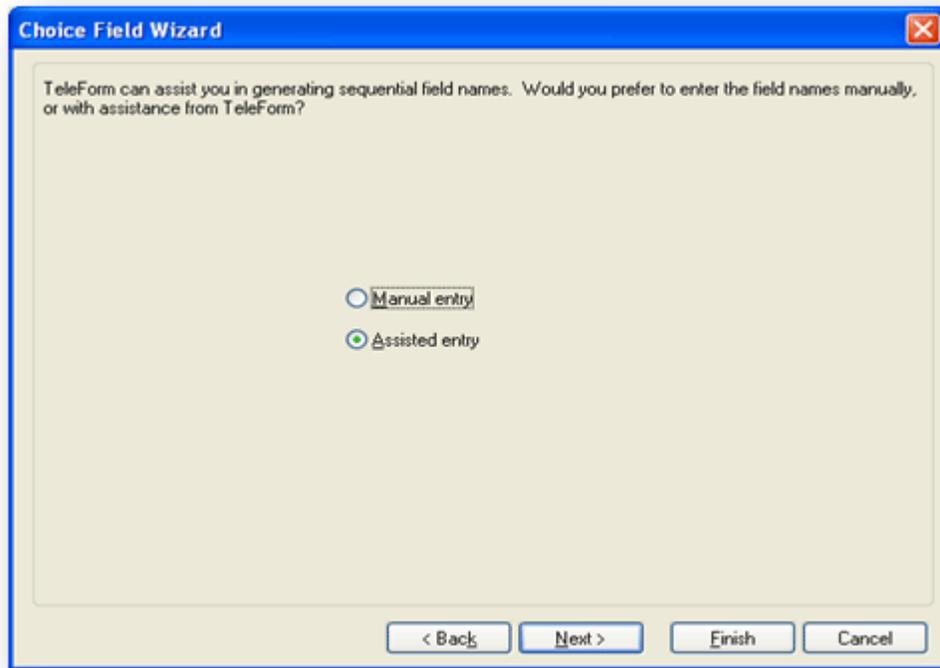
1. Click the **Choice Field** toolbar button or click **Choice Field** from the **Shape** menu. The cursor changes to the Choice Field tool.
2. Click the cursor on the Form Template where you want the Choice Field to appear.
3. When you release the mouse button, the **Choice Field Wizard** will appear.



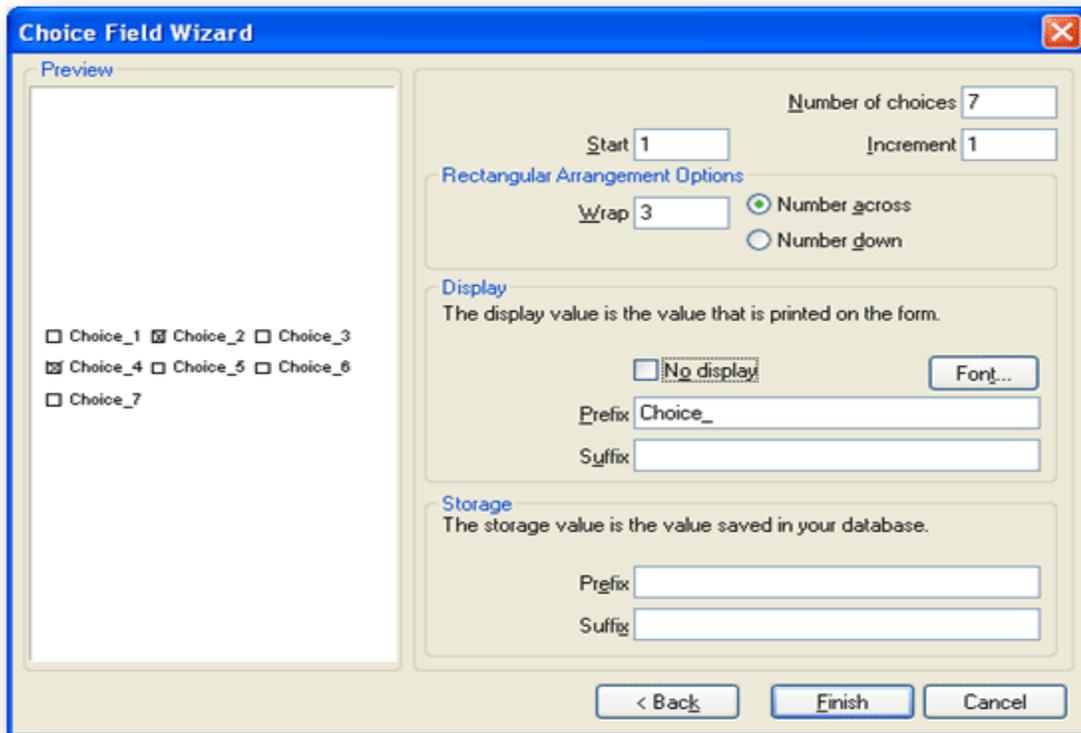
4. On the **Style** dialog box, choose the Response Marks (bubble, box, underline, response, bracket, round bracket) you would like to use and click **Next**.
5. On the **Arrangement** dialog box, choose how you would like the individual choices arranged (vertical, horizontal or rectangular) and click **Next**.



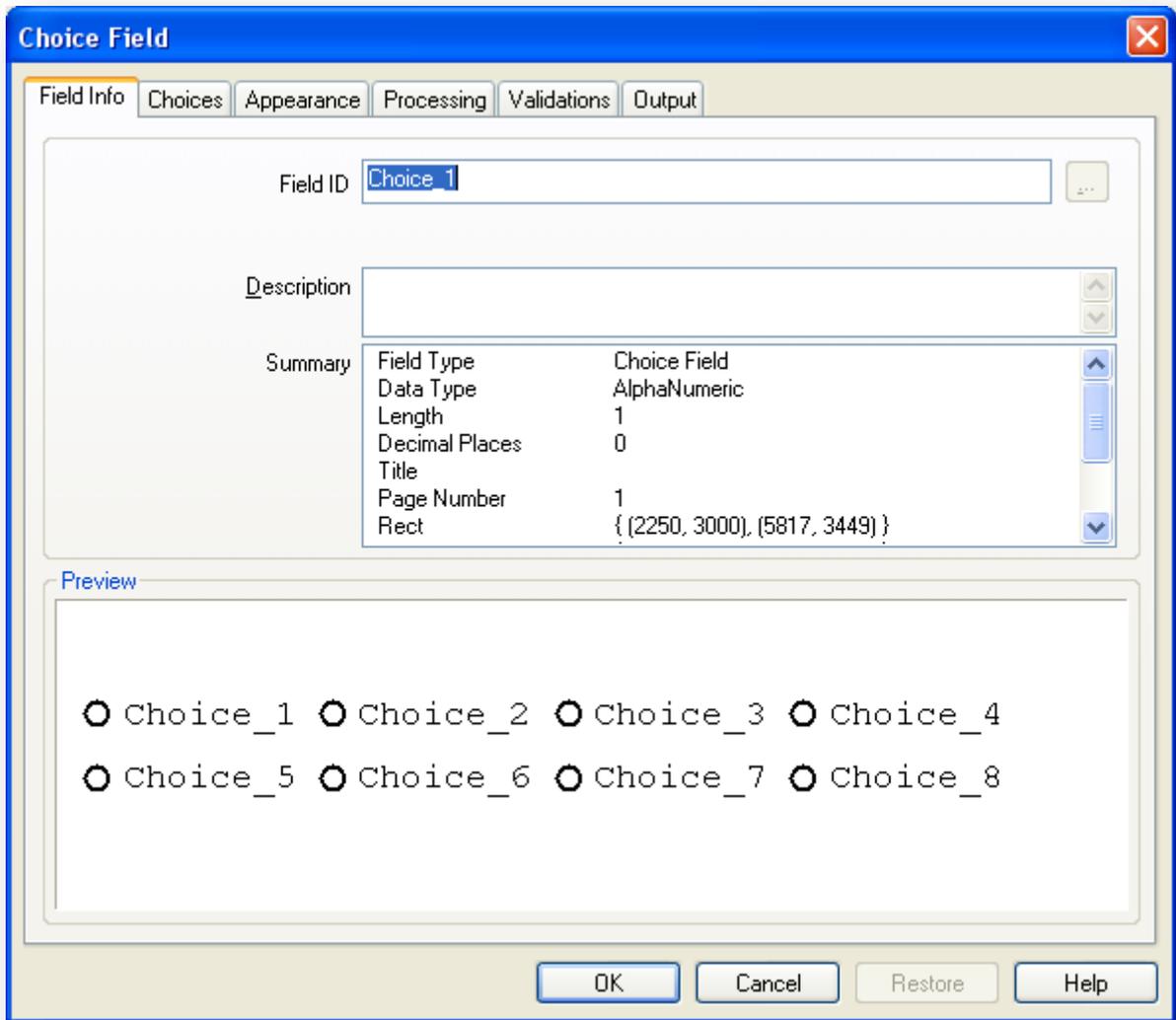
6. Choose between **Manual Entry** and **Assisted Entry** and click **Next**.
7. If you select **Manual Entry**, the **Choice Field Wizard** will close, replaced by the Choice Field dialog box.



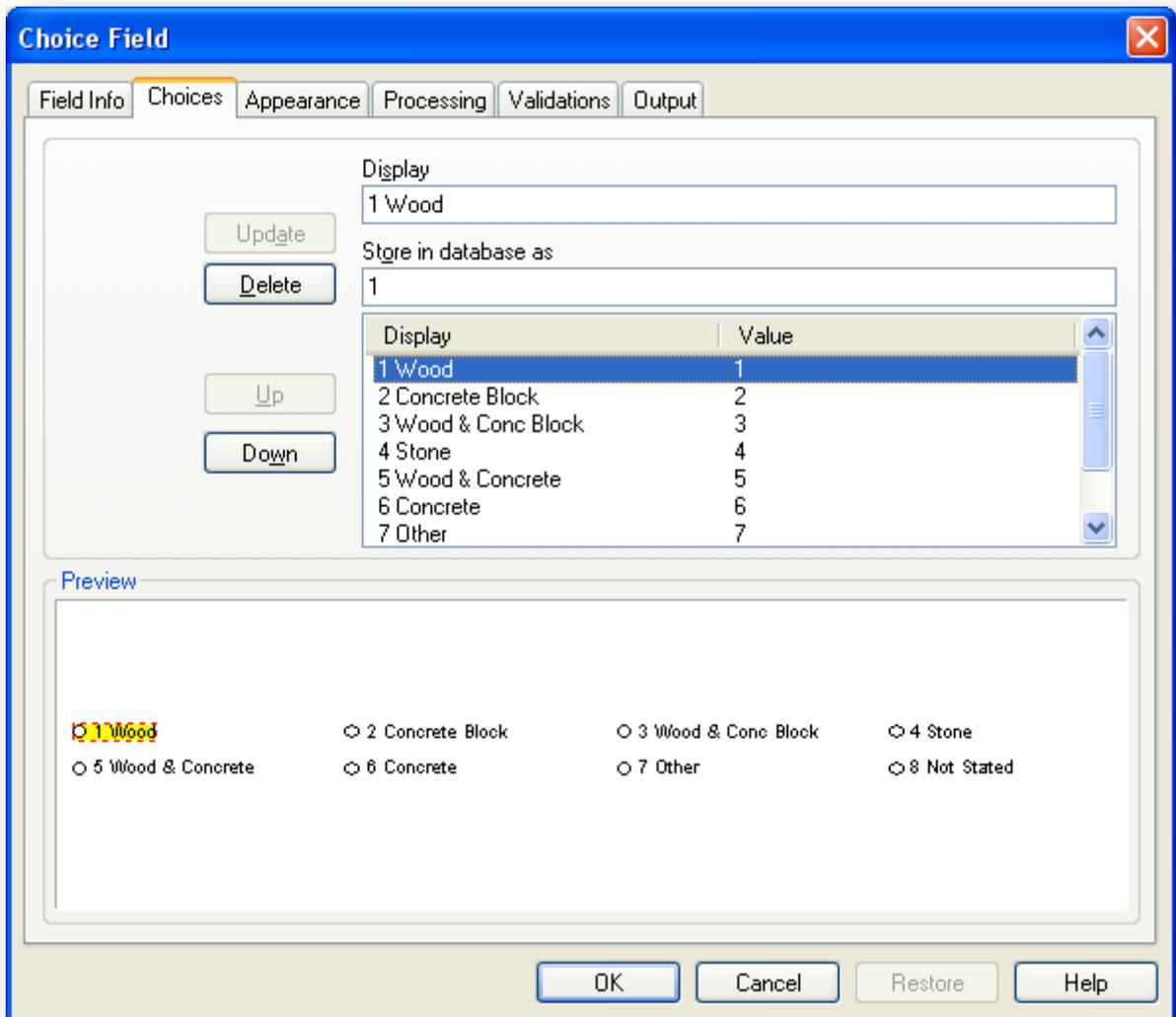
8. On the final **Choice Field Wizard** screen, configure the field.
9. Define how many options you want the field to contain in the **Number of choices** box.
10. To change the number associated with the first choice, type a new value in the **Start** box.
11. To change the increment between each choice, type a new value in the **Increment** box.
12. If you selected a **Rectangular** layout in step 5, you can use the controls in the **Rectangular Arrangement Options** section to change the appearance of the field.
13. Select the **Number across** button to arrange the field in columns. Type a new value in the **Wrap** box to set the number of columns.
14. Select the **Number down** button to arrange the field by rows. Type a new value in the **Wrap** box to set the number of rows.



15. Choose the **Display** and **Storage** values. The options that are printed on a Form are called the Display Values. When TeleForm evaluates a form and determines what option has been selected, it writes a corresponding *Storage Value* to the database. The Display Value and its corresponding Storage Value do not need to match.
16. Select the **No display** checkbox if you do not want to print Display Values on the forms.
17. You can edit the default text (Choice) in the **Prefix** and **Suffix** boxes to create a new Display Label. To add a space between the Display Value and the number of the option, press the SPACEBAR. You do not need to type a dash or line.
18. To change the Display Values' appearance, click the **Font** button.
19. The **Storage** controls define what values will be exported to the database. At this point, the Storage Values are the numbers of the options in the field. For example, the Storage Value for Choice 2 is 2.
20. The **Prefix** and **Suffix** boxes allow you to add characters to the front or back of these default Storage Values, but the number will still be included.
21. Click **Finish**. The **Choice Field** dialog box will appear.



22. Under Field Info tab, type a name in the Field ID box.
23. Select the Choice tab to change the display names and values of the data that will be displayed and exported.
24. Click on the first selection. The values highlighted will be displayed in the **Display** and **Store in database as** boxes above.
25. In the Display box, type the value label to be displayed on the form e.g. 1 Yes. Click **Update**. The **Store in database as** value can also be changed as required. Click **Update** to complete the process. The updated values are now displayed under **Display** and **Value** in the box below as well as in the **Preview** box. Continue this process until all the choices have been updated.



26. Under the **Appearance** tab, you can select **Show Title** and change the **Title Text** to be displayed on the form next to the Choice Field. Adjust the format to the text as necessary.
27. Under **Validations** tab, check the appropriate selection. Click **OK**.

Multiple Choice Fields

By default, Choice Fields permit only a single choice. However, this setting can be changed to allow multiple responses.

There are three storage options available for multiple responses.

Single Column Variable – Every marked choice will be stored in a single column in the data file. Two space characters will separate each selected choice. No space will be reserved for choices that were not selected. For example, if a user chooses two of five possible options, the exported data file will contain the two chosen options without separators for the unmarked choices.

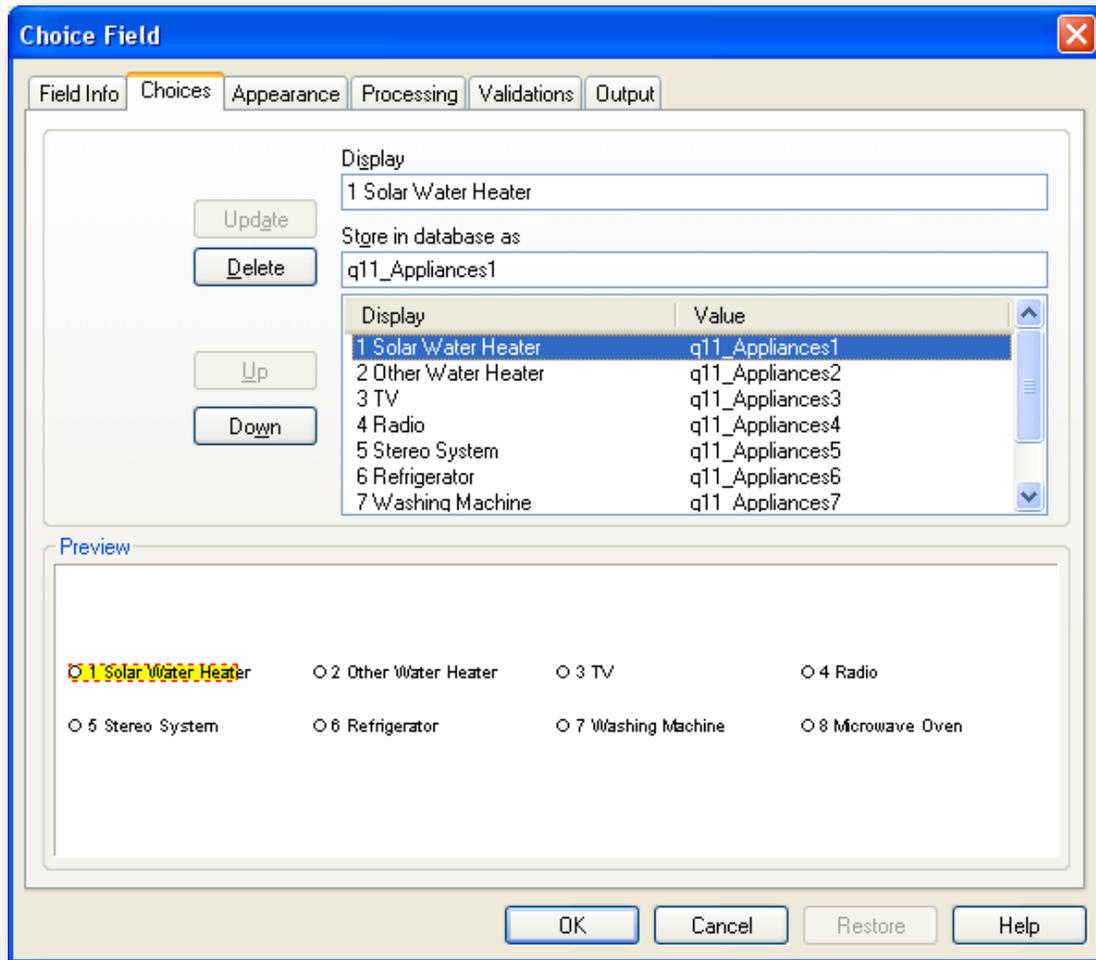
Single Fixed Column – Every marked and unmarked choice will be stored in a single column. Two space characters will separate each choice. For example, if there are five choice options in the field, the exported data file reserves five positions for the data, using four delimiters, regardless of how many choices were actually selected.

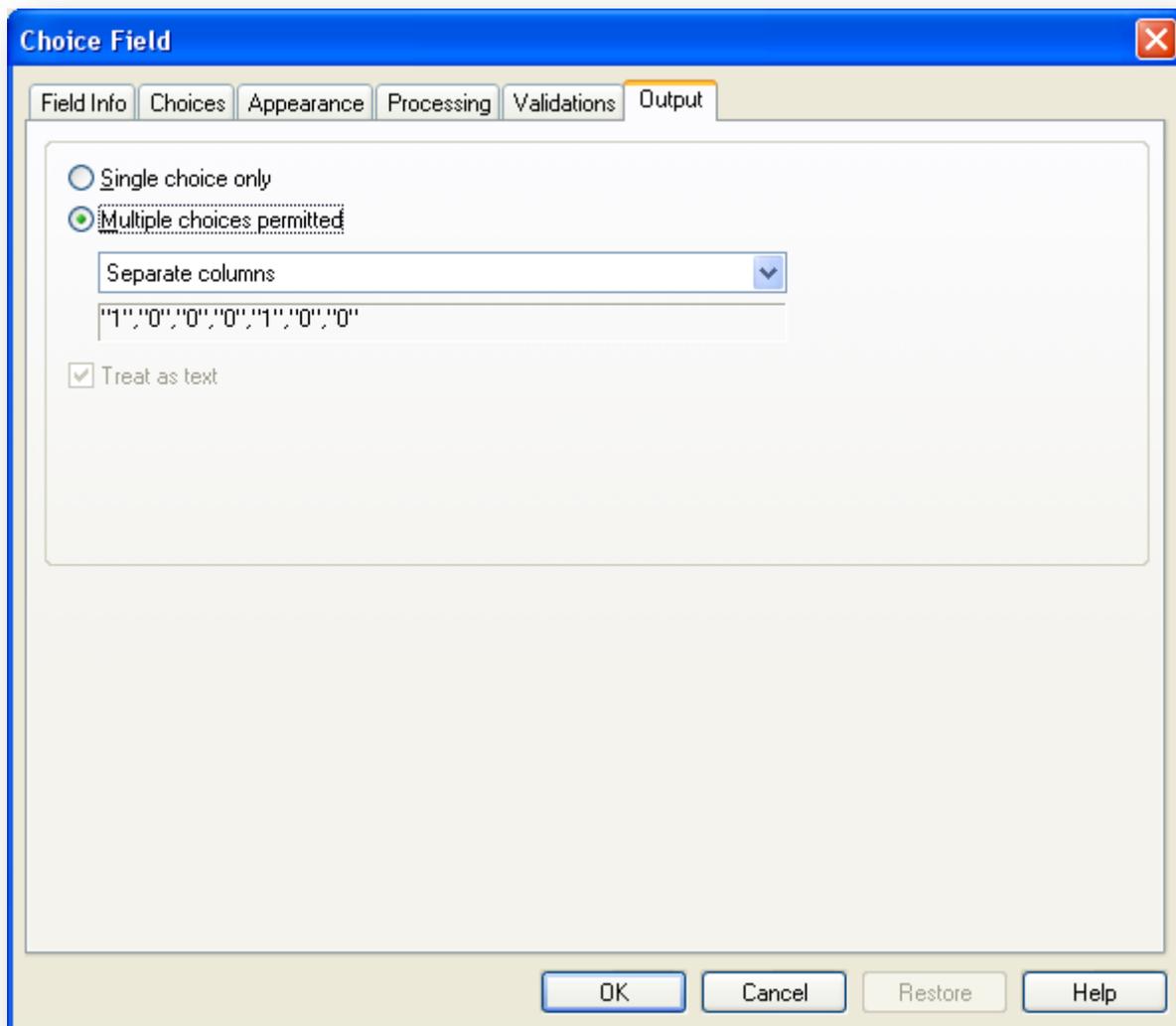
Separate Columns – Each selected choice is stored in a separate column in the data file. In the export file, each selected choice will have a "1" in its column while unselected choices will have a "0."

How To Set A Multiple Choice Field

1. Under the Choices tab, change the value from a numeric character to either include the Field ID name before it, or give it a value name. (Multiple choice field values must begin with an alpha character).
2. On the **Choice Field** dialog box, open the **Output** tab.
3. Click the **Multiple choices permitted** button.
4. Choose a storage option from the drop list.
5. Click **OK**.

If the selected Storage option is **Separate Columns**, you have to adjust the **Store in database as** box under the **Choices** tab by copying the **Field ID** name under **Field Info** tab and pasting it at the beginning of each value in the **Store in database as** box. This ensures that each value will be entered in its own column.

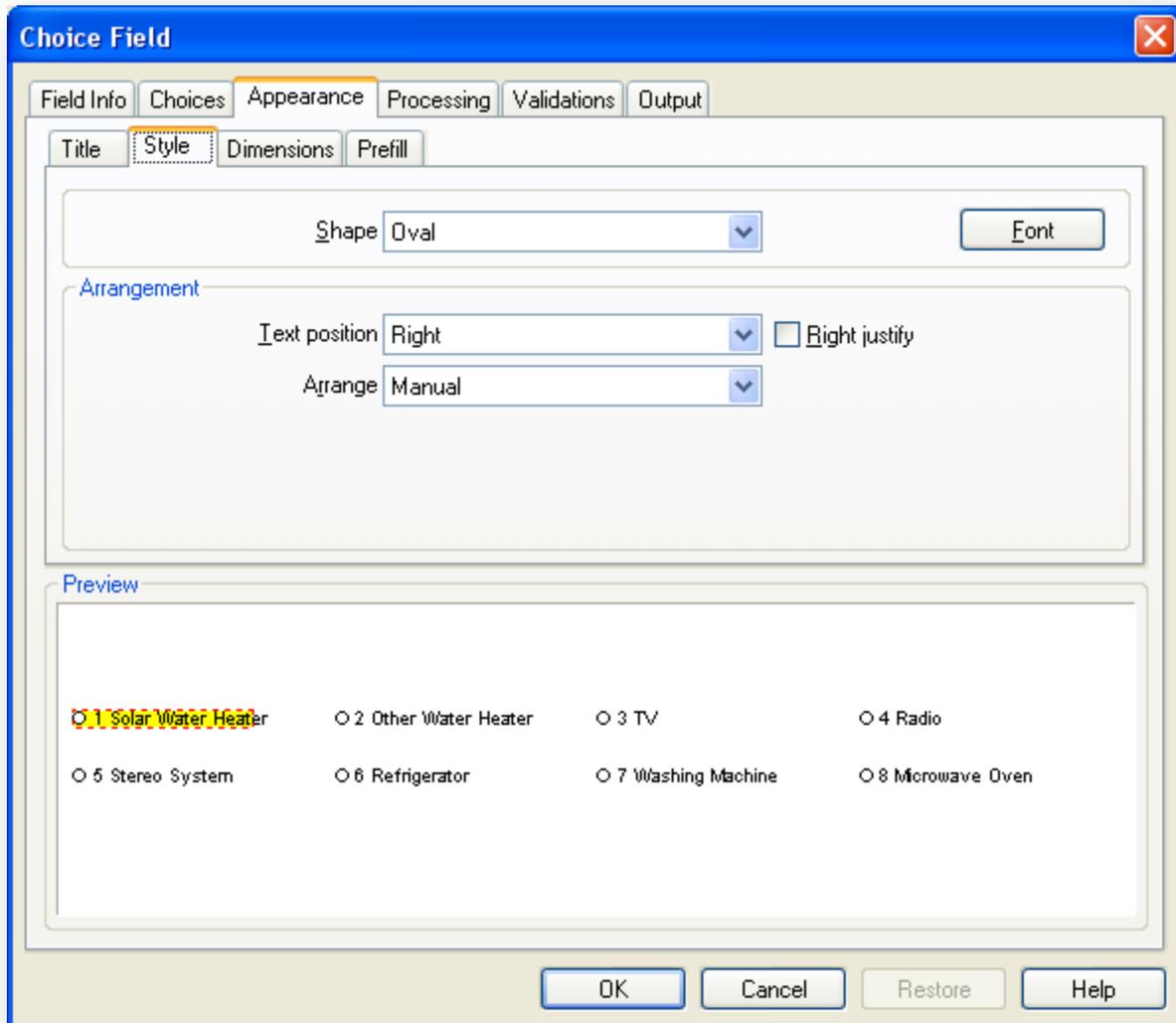




Editing Choice Fields

1. Open the **Properties** dialog box for the Choice Field.
2. From the **Appearance** tab, open the **Style** sub-tab.
3. From the **Shape** list, choose the desired style of Response Mark.
4. The **Font** button allows you to change the font that will be used to display the choice values.
5. Choose a **Text position** for the display values relative to the Response Marks.
6. Select Vertical, Horizontal, or Rectangular from the **Arrange** list. Choosing Manual has no effect.
7. The **Right justify text** box aligns the display values by their far right edges.

8. Click **OK**.



Editing Choices in a Choice Field

1. On the **Choice Field** dialog box, open the **Choices** tab.
2. In the **Display-Value** window, select a choice to edit.
3. In the **Display** Field, type a new display value for the choice.
4. If necessary, type a new value in the **Store in Database Field**. This value is the Storage Value.
5. Click the **Update** button.
6. To change the sequence of the choices, select one in the **Display-Value** window and use the **Up** and **Down** buttons.

7. Click **OK**.

Adding New Choices to a Choice Field

1. On the **Choice Field** dialog box, open the **Choices** tab.
2. In the **Display Field**, type the display value for the new choice.
3. Type a storage value in the **Store in Database Field**.
4. Click **Add**. If the **Update** button has replaced the **Add** button, you inadvertently selected an existing choice after opening the **Choice** tab. After selecting an existing choice you cannot add a new choice until you reopen the **Choice Field** dialog box.
 - Click **OK** to save any recent changes you have made and to exit the dialog.
 - Click **Cancel** to prevent any changes you've made since you opened the Choice Field dialog from taking effect.
 - You can now reopen the dialog and add a new choice.
5. Repeat these steps for any additional new choices.

Manually Editing a Choice Field

Changing the Order of the Choices

You can change the order in which choices appear within the field. For example, you could move the last choice to the top of the field.

1. Hold down the ALT key.
2. Click the Response Mark and display value combination that you want to move. Grab handles will surround the option.
3. Drag the selected option to its new location.
4. Repeat steps 1 through 3 for other segments of the Choice Field.
5. Click anywhere on the form to stop editing the Choice Field.

Resizing a Choice Field

You can change the spacing between the options in a Choice Field by changing the overall size of the field.

1. Click the Choice Field so that its grab handles appear.
2. Drag one of the grab handles.
3. As you drag, the new size is shown by a dashed line. When you release the mouse button, the field takes its new size.

CAPTURE ZONES

Capture Zones provide two special functions when a form is processed in Verifier:

- A "snapshot" image of the form/attachments being corrected;
- A special data entry screen.

The "snapshot" image shows the information on the form and any attachments. The special data entry field allows Verifier operators to type this data, which will be exported to the storage database configured for the Form Template.

Capture Zones are typically used to capture large blocks of printing, cursive writing or images that are too poor in quality to be automatically recognized. A Capture Zone allows the Verifier operators to see the original response and to type it as alphanumeric data, which results in higher accuracy.

Capture Zones are built from four basic elements:

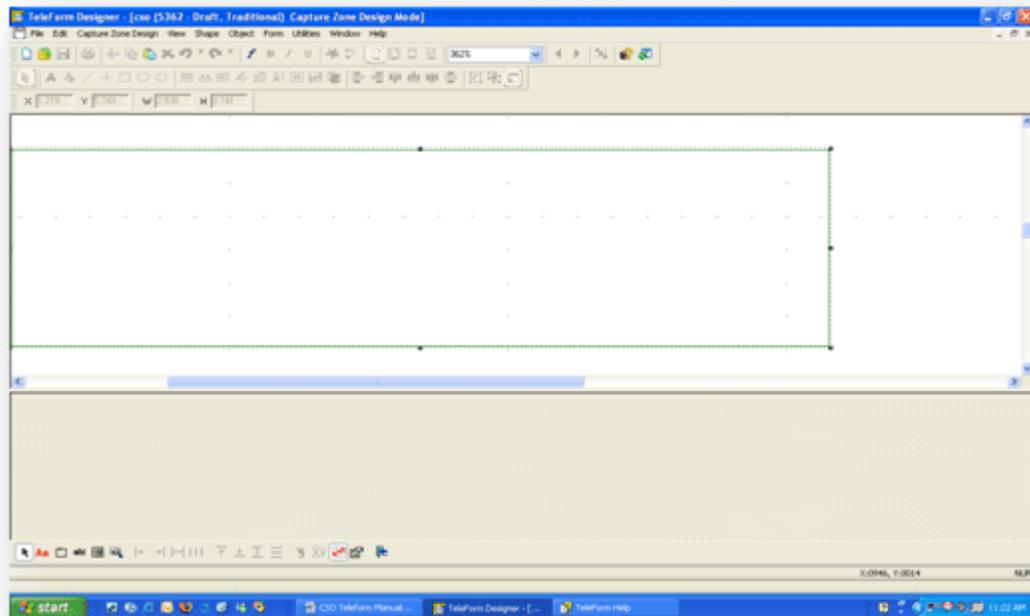
- **Labels**, which identify the purpose of the data entry field;
- **Edit Boxes**, which allow Verifier operators to type data;
- **Choice Lists**, which allow Verifier operators to choose from a list of defined options; and
- **Freeform OCR Fields**, which can be populated automatically or by manual data entry.

The Capture Zone has its own designer workspace, as you cannot work in the basic Designer window once the Capture Zone design window is open. The Capture Zone workspace consists of:

- **The Capture Zone Design Menu:** This menu is added to the regular Designer menu bar when you open the Capture Zone Design Window. It provides all of the commands available for a Capture Zone and the objects within these Zones.
- **The Basic Designer Window:** This window shows you the part of the "actual" form on which the Capture Zone is located. You can't work in the basic Designer window when the Capture Zone Design Window is open.
- **The Capture Zone Design Window:** This window is similar to the regular Designer window. It serves as an electronic pasteboard on which you can add and arrange objects in the Capture Zone. The Status Bar at the bottom of the Capture Zone Design Window shows you the position and size of the object that is currently selected in the Capture Zone Design Window.
- **The Capture Toolbar:** The toolbar buttons provide shortcuts to commands that are also available from the **Capture Design** menu.

How To Create a Capture Zone

1. From the **Shape** menu, click **Capture Zone**, OR Click the **Capture Zone** toolbar button.
2. Click and drag the cursor to outline the Capture Zone.
3. When you release the mouse button, your new Capture Zone will appear.



4. Double-click the Capture Zone. The Capture Zone Design Window will appear. The Capture Zone appears as a green rectangle with broken lines.
5. Select Zone Properties. This window displays and edits the properties of the entire Capture Zone.
6. Under Field Info, Zone ID, type a name for the zone.
7. Under Zone Density, you can check the box next to **Skip entry if zone not filled in**. Put an appropriate percentage in the Empty Zone Density box. When this is done, the Verifier will check the Zone to verify if the percentage of the zone covered is in-keeping with the valid percentage to be filled in, and will either bypass it or allow the entry to be verified accordingly. Click OK.
8. Once the Zone ID properties have been customized to suit your needs, you can proceed to create the appropriate data capture options in the Capture Zone.

Capture Zone

Attributes

Field info

Zone ID

Zone Density

Skip entry if zone not filled in

Empty zone density (% filled)

Entry font size

Image/Data Entry Positions

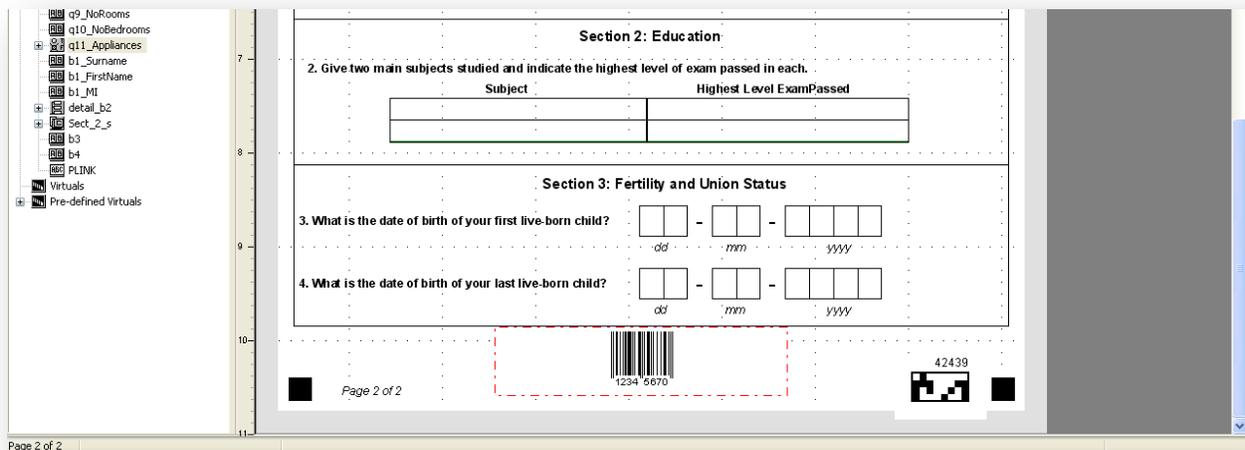
Initial Image Display

Image storage

Store Image

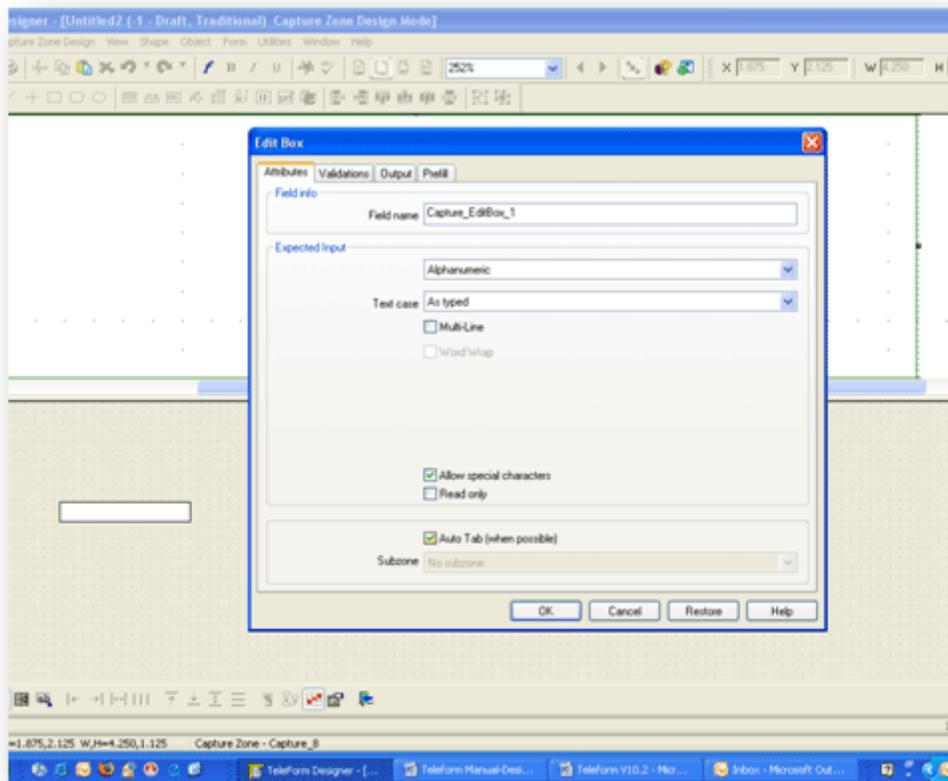
In database (if supported)

Unlike other entry fields, the Capture Zone option does not provide the option of naming and displaying the title of the field on the form. This has to be done with the Text tool. Lines or boxes also have to be drawn to indicate the area on the printed form where the data must be placed. Lines are drawn within the Capture Zone box and boxes are drawn the same size as the Capture Zone box.



How To Create An Edit Box

1. Follow 1 to 8 under **How to Create a Capture Zone**.
2. Click the **Edit Box** toolbar button or from the **Capture Design** menu, click **Tools — Edit Box**.
3. Move the cursor to the desired position for the Edit Box and click. The **Edit Box** dialog box will appear.
4. Under the Attributes tab, Field ID, type in a name for the field.
5. Under Expected Input, make the relevant selections according to the type and style of data you are expecting. Select **Multi-line** and **Word Wrap** if you expect the data to run onto more than one line.
6. Under the Validations, Output and Prefill tabs, make the relevant selections and click OK.
 - Note that under the Output tab, the maximum length of alpha characters allowed in the Length field is 30,000; for numeric fields, **Length** includes numbers before and after the decimal point.



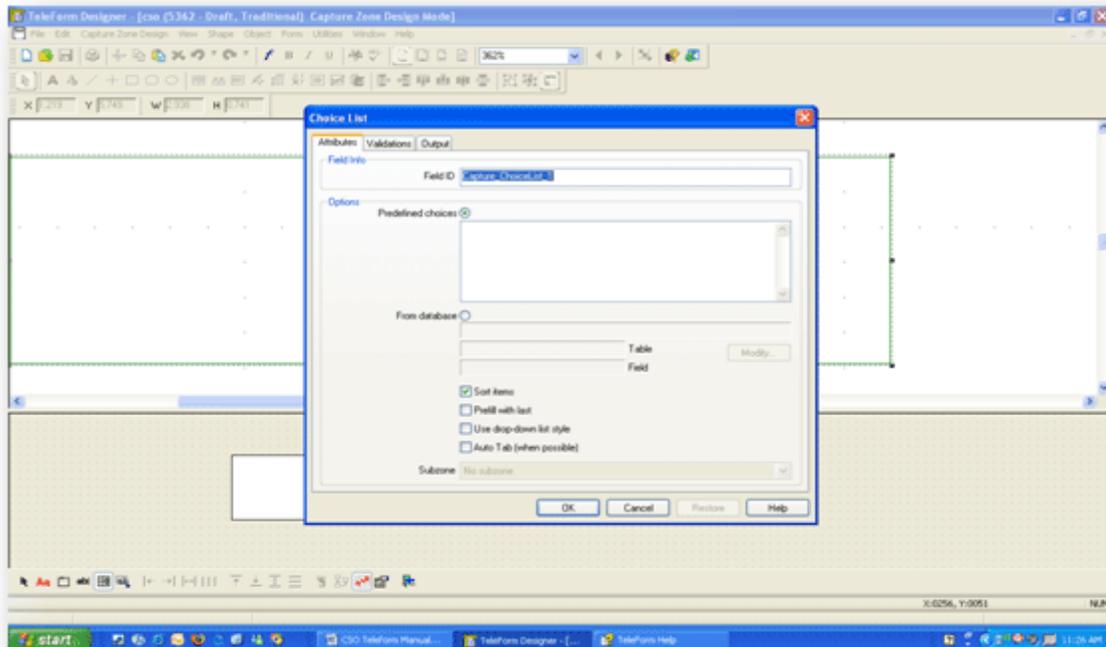
How To Create A Choice List

1. Follow 1 to 8 under ***How To Create a Capture Zone***.
2. Click the **Choice List** tool or open the **Capture Design** menu and click **Tools — Choice list**.
3. Place the cursor within the Capture Zone and click. The **Choice List** dialog box will appear.
4. Under the Attributes tab, Field ID, type in a name for the field.
5. Under Option, in the Predefined Choices box, you can type or paste in a list of specific data relevant to that field. The name can consist of letters, numbers, and/or special characters. Press enter after each choice is typed in.
6. You can customize the Choice Field by selecting any of the following options in the window:

Sort Items – this function allows you to sort alphabetic or numeric lists

Prefill with Last – the Choice Field will automatically be prefilled with the value from the same Choice Field on the last form processed by the Verifier operator. Check this option for Choice Lists that change values infrequently between forms.

Use drop-down list style – this function makes the Choice List appear as a drop-down list rather than as a list that is always fully extended.

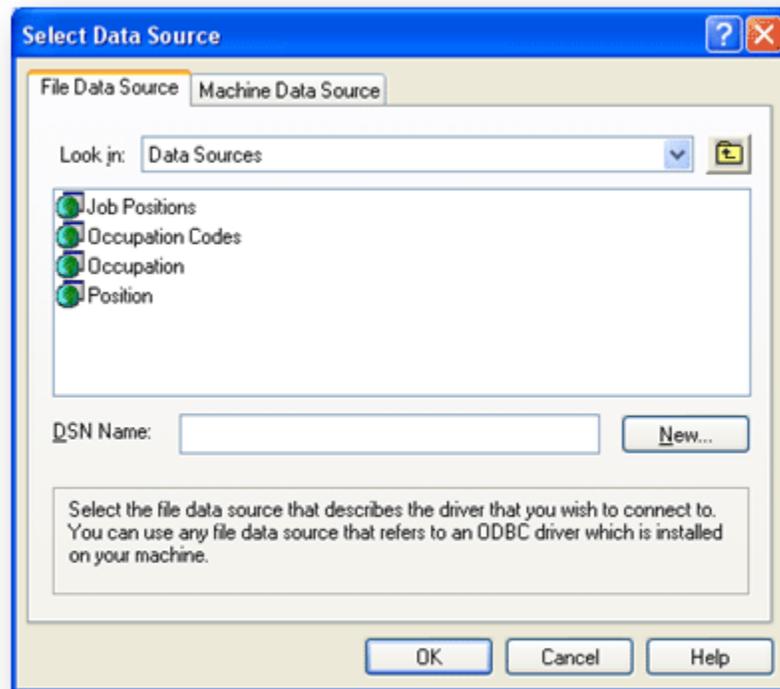


Auto-tab when possible - Verifier will automatically move to the next field in the Capture Zone after a Verifier operator selects an item in the Choice List.

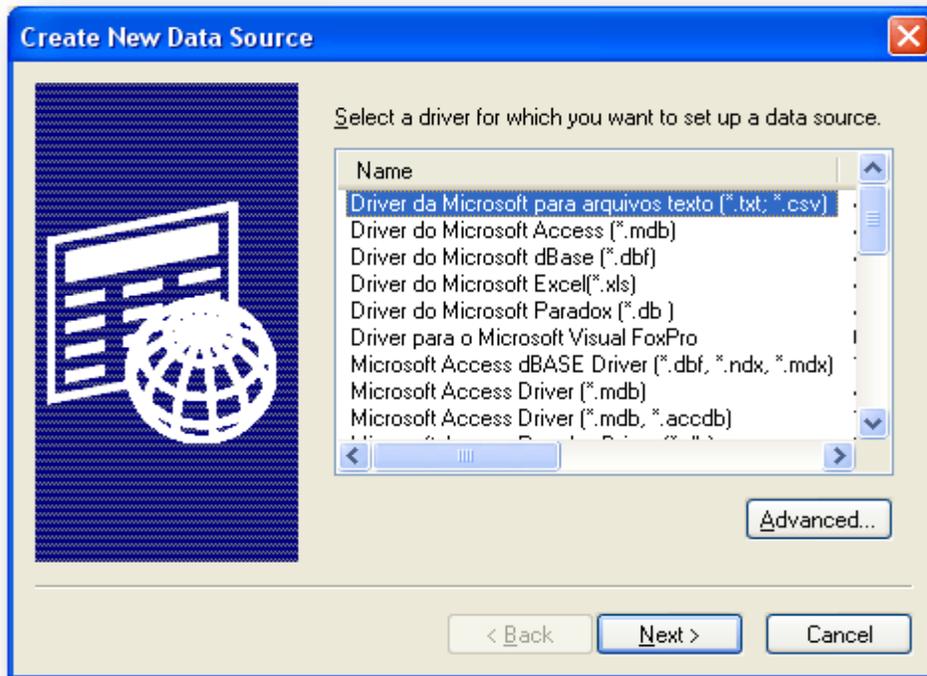
7. Under the Validations tab, make the appropriate selection.
 - If you select the **Entry Required** option, the Verifier operator will be unable to move out of the Choice List until an item is selected.
 - The Allow Free Entry option applies only if the choices are provided from a database. When enabled, Verifier operators can type new entries into the Choice List if none of the listed choices are appropriate. If you want to capture any free entries made by Verifier operators, click the **Add New Entries to Text File** checkbox. If you do not select this option, the free entry will be exported to the data file but will not be stored in a separate file where it will be easier to find. Click the **Browse** button and set up a text (.txt) file for saving a list of any free entries made by Verifier operators.
8. Under the **Output** tab, make the relevant selections and click OK. Note that in the **Output** tab, the maximum length allowed in the Length Field is 300 for text; for numeric fields, **Length** includes numbers before and after the decimal point.

Linking Choice List to a Database

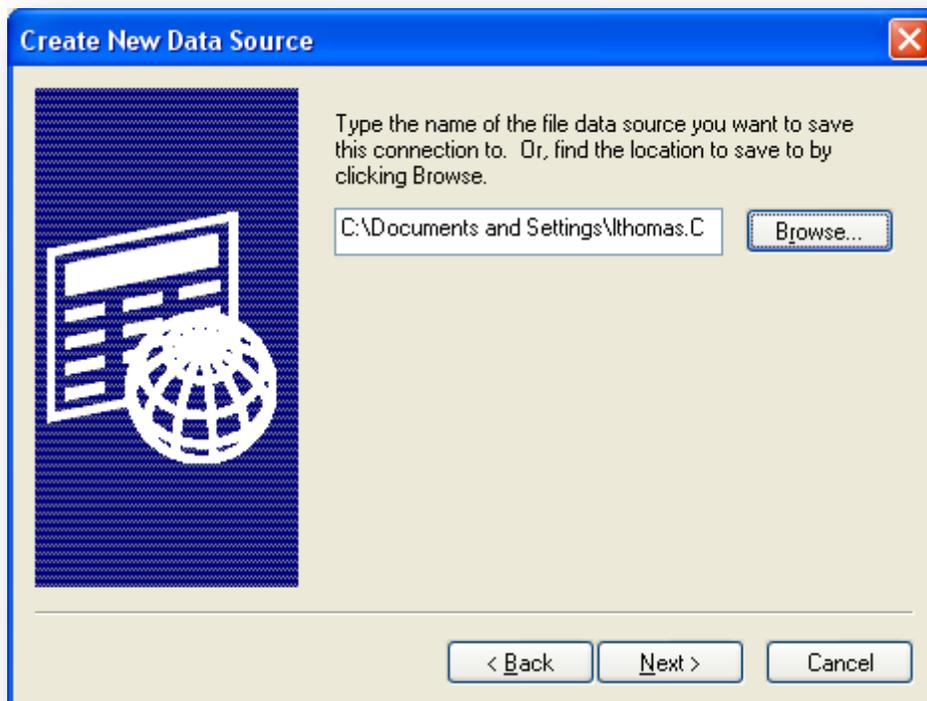
1. On the **Attributes** tab, select the **From database** button in the **Data Source** section.
2. In the **Database Choices** section, click the **Modify** button. The **Select Data Source** dialog box will appear.



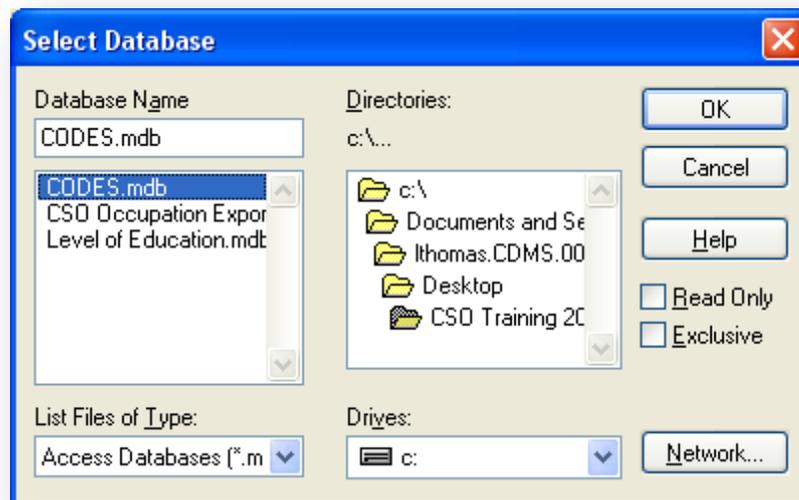
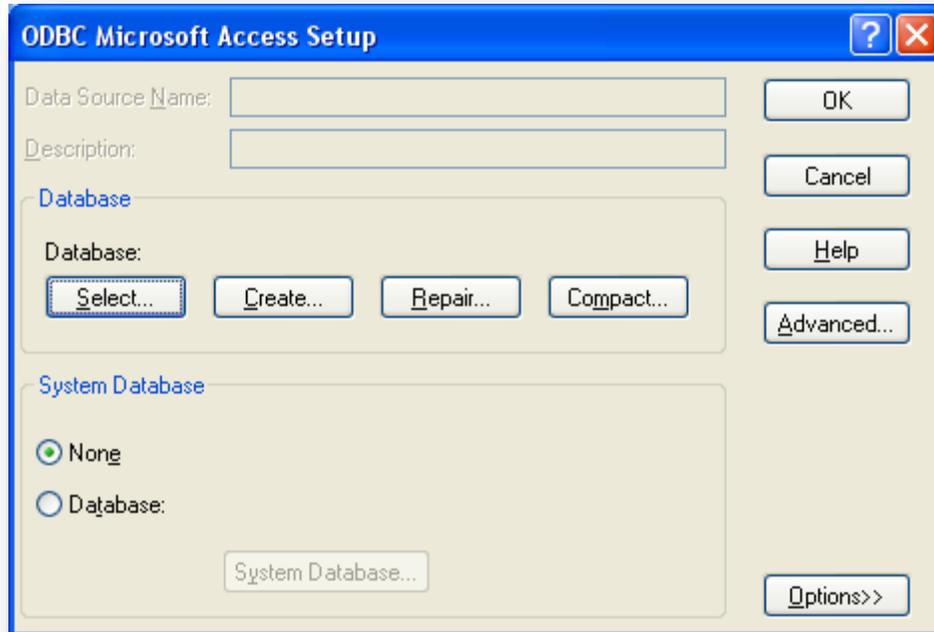
3. Select **New**. The **Create New Data Source** window appears.
4. From the drop down list, choose the data source from which you will be getting your data. Click **Next**.



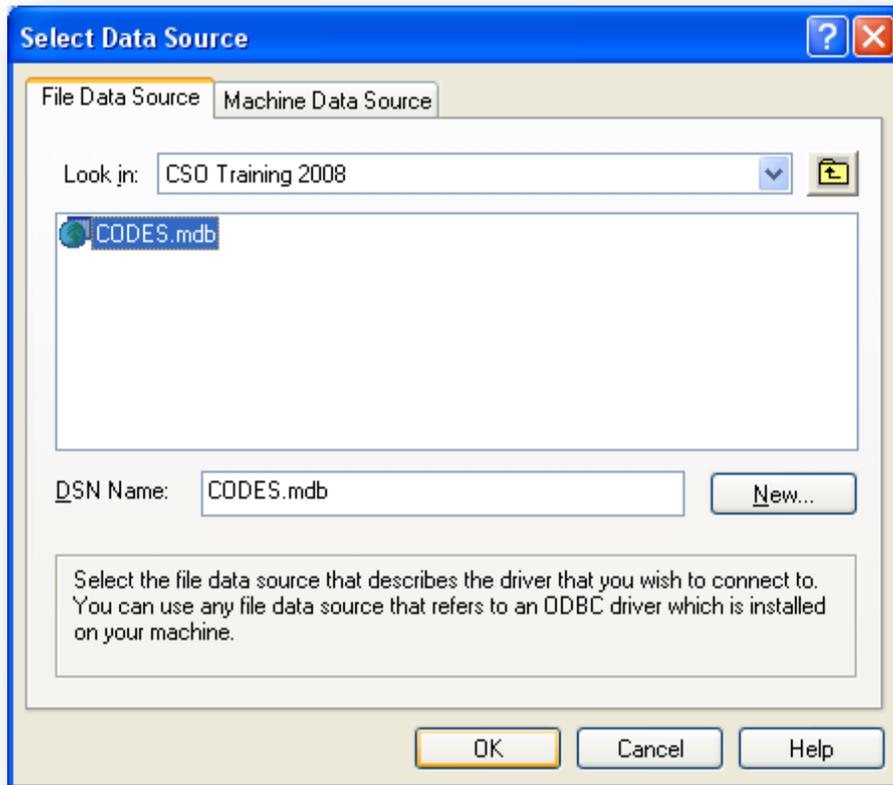
5. In the Create New Data Source window, you can either browse to the location of your data source or type in the name of the data source you want to connect to. Click Next, browse to the location of the database and then click Save, Next and Finish.



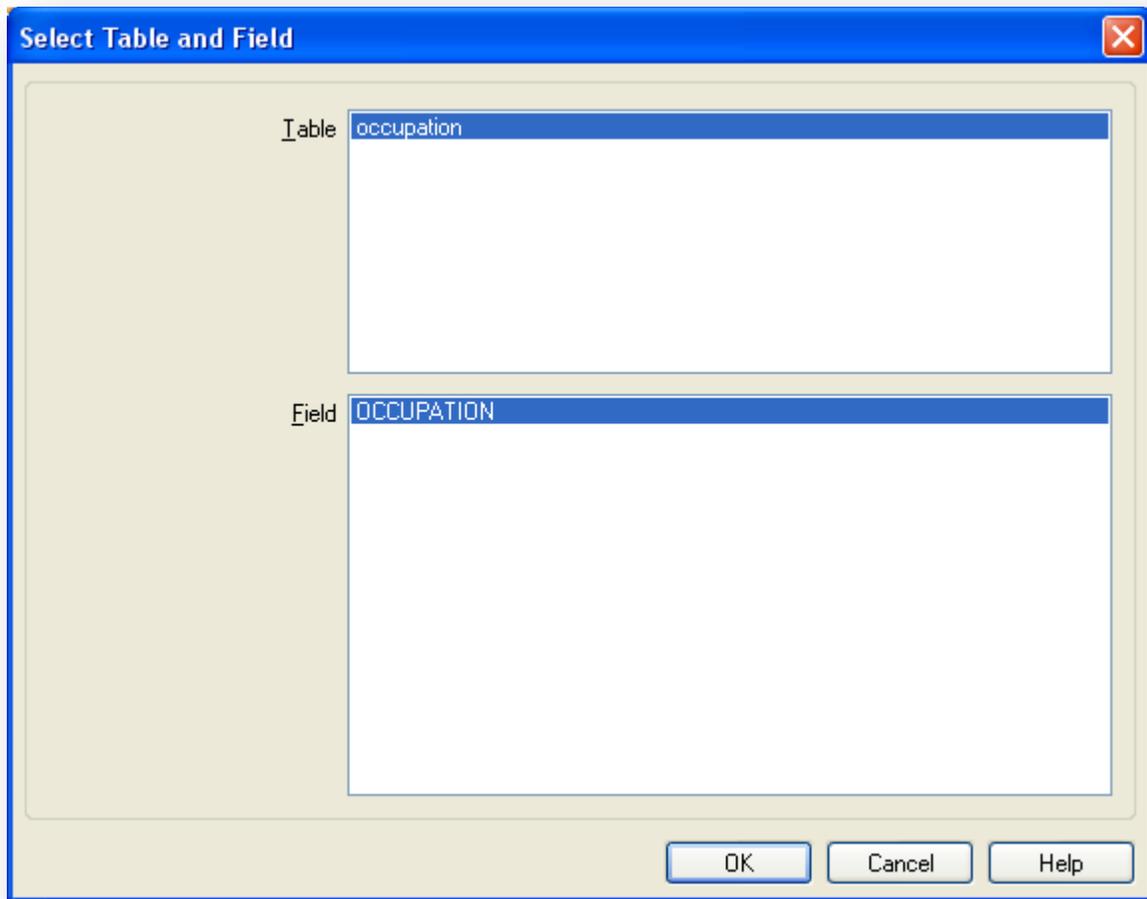
6. In the ODBC Setup Window, click Select and locate the database from the directory listing. When you select the directory where the database is located, the database name will appear under Database Name. Select it there and click OK.



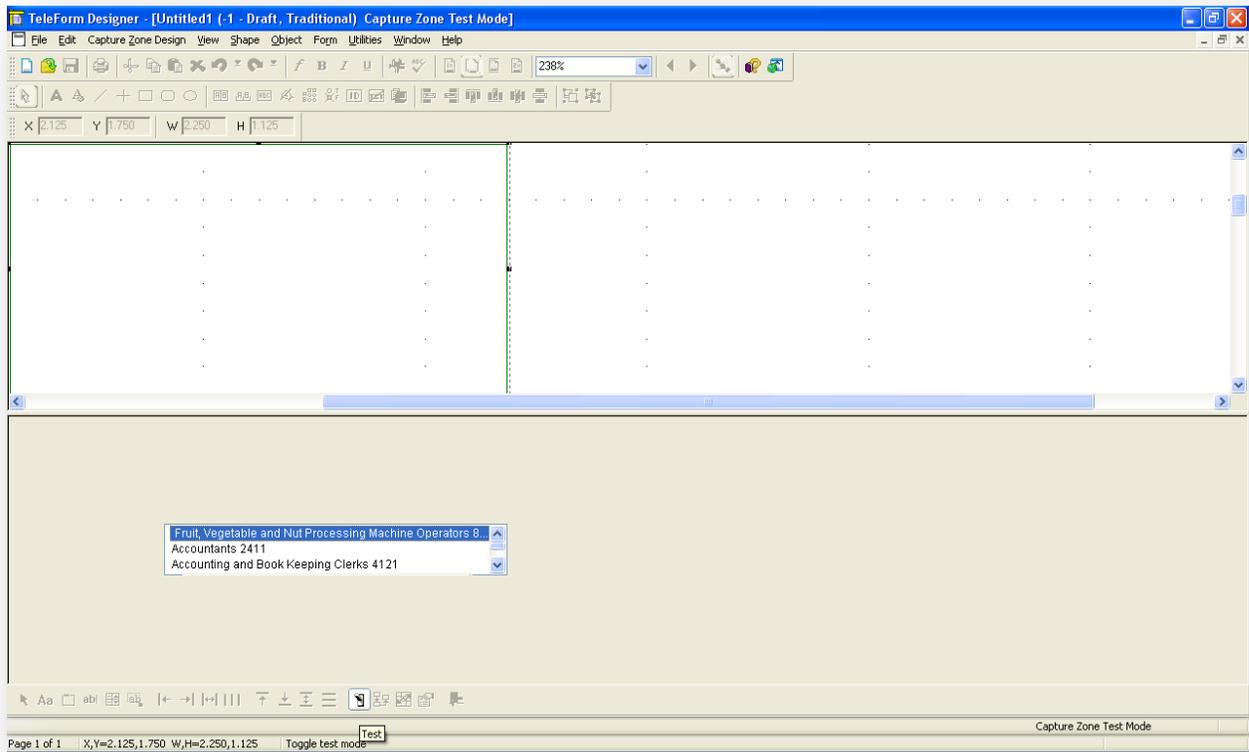
7. Click OK in the ODBC Setup Window.
8. In the Select Data Source Window, the database name will appear. Click on it to make it appear as the DSN name. Click OK.



9. In the Select Table and Field window, select the Table and then the relevant Field. Click OK.

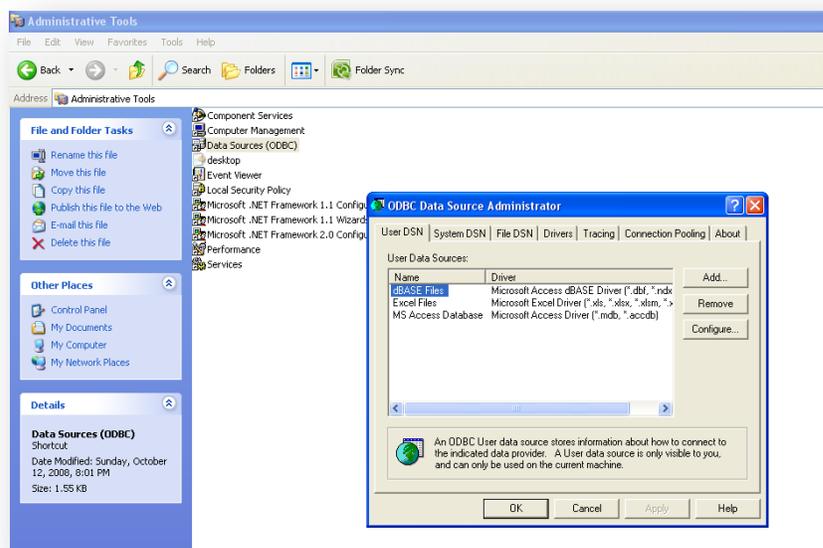


10. In the Choice List main window, click OK. The database has been set up and can now be accessed.
11. To test that it is available, click the Test button in the Capture Zone Design Mode. This will activate the database field and allow you to view the database as the Verifier would.

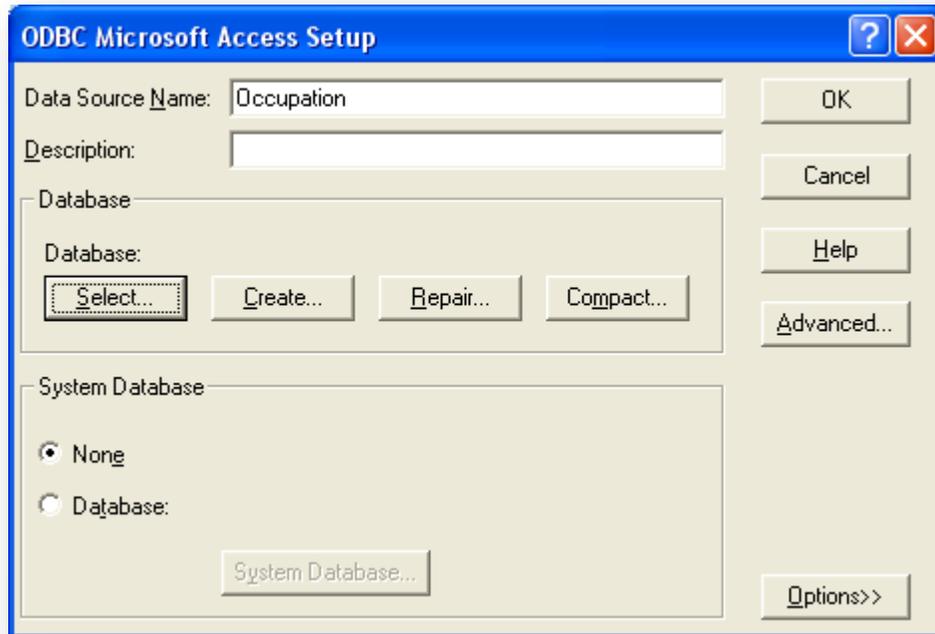


This process can also be done through the ODBC Data Source Administrator in the Administrative Tools.

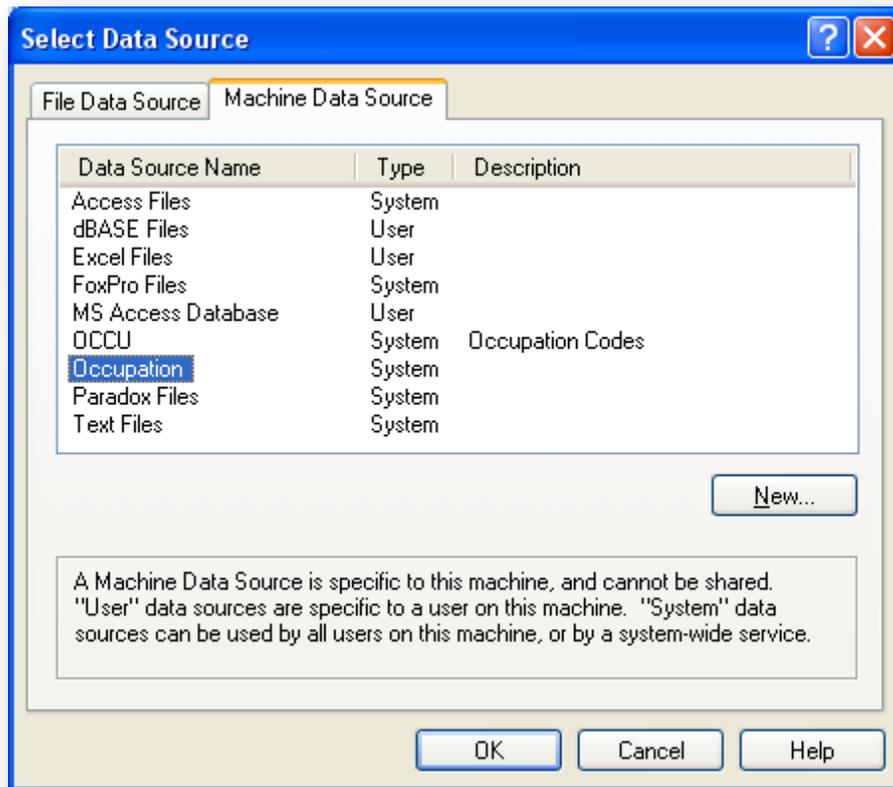
1. Under Control Panel, Administrative Tools, select Data Sources (ODBC).



2. Choose the System DSN tab and select the relevant database driver. Click Add.
3. In the Create New Data Source Window, select the relevant database driver again. Click Finish.
4. In the ODBC Setup window, type in the Data Source Name. Click Select.



5. Locate the database and select the database name. Click OK.
6. The name you gave the database should be in System DSN list of database drivers. Click OK.
7. Create a Capture Zone and select Choice List.
8. Select From Database and Modify.
9. In the Select Data Source window, click on the Machine Data tab. Select the database you named in the ODBC set up. Click OK.



10. In the Select Table and Field window, select the Table and then the relevant Field. Click OK.

11. In the Choice List main window, click OK. The database has been set up and can now be accessed.

Freeform OCR Fields

The Freeform OCR Field lets a Verifier operator specify what text will be captured but uses automated recognition to actually capture it. It is used when you cannot be sure where a specific piece of information will be found on a file, but you do not want your Verifier operators to spend time typing it into an Edit Box once it is actually located.

How To Create a Free Form OCR Field

1. Follow 1 to 8 under ***How to Create a Capture Zone***.

2. Click the **Freeform OCR Field** toolbar button or Open the **Capture Design** menu and click **Tools — Freeform OCR Field**.
3. Place the cursor within the Capture Zone and click. The **Freeform OCR Field** dialog box will appear.
4. Change the Freeform OCR Field's properties as needed.

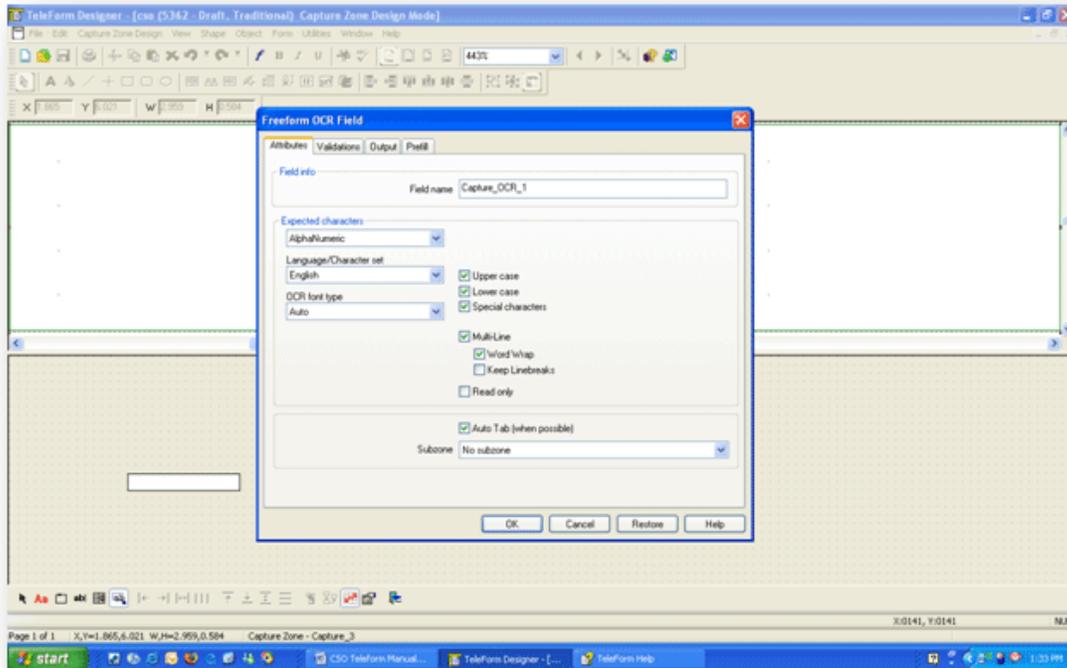


IMAGE ZONES

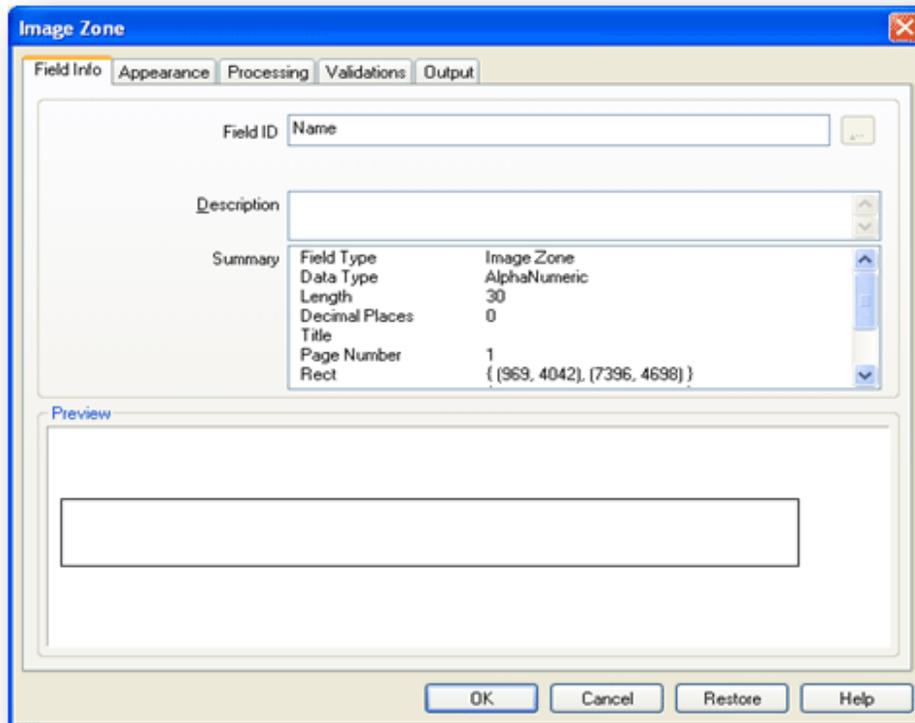
An Image Zone defines and reserves an area on a Form Template for:

- *Evaluating* information, such as a name, monetary charge, bar code, or encrypted text;
- *Capturing* information, like an image of a drawing, without evaluating it.

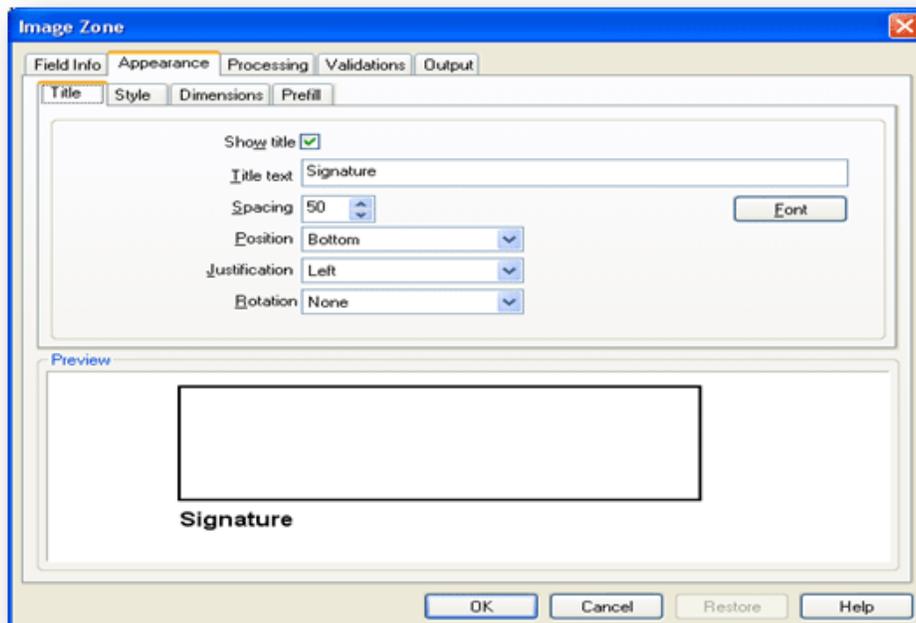
How to Create An Image Zone

1. Click the **Image Zone** button or click **Image Zone** on the **Shape** menu.
2. Press the mouse button and drag the cursor to set the location and size of the Image Zone.
3. When you release the mouse button, the **Image Zone** dialog box will appear.

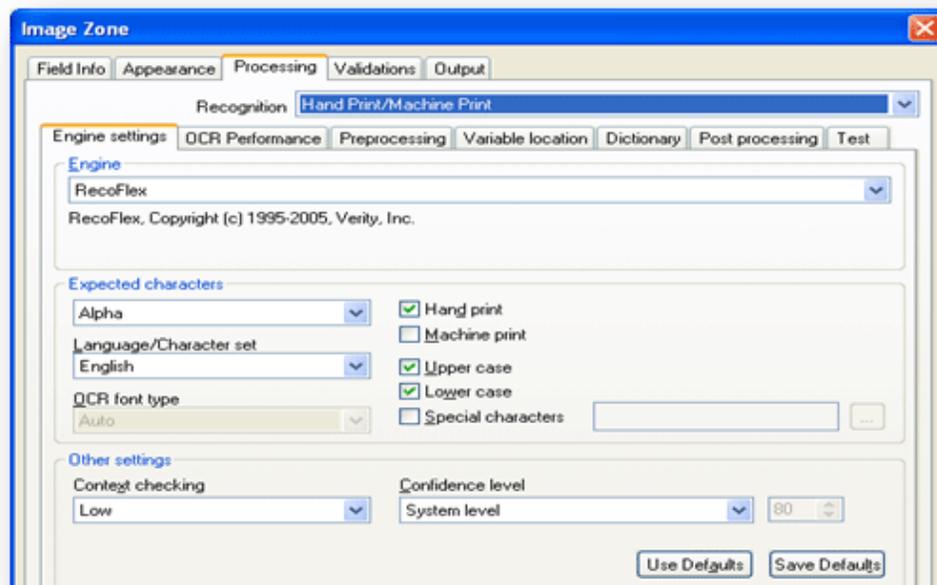
4. Type a name in the Field ID box.



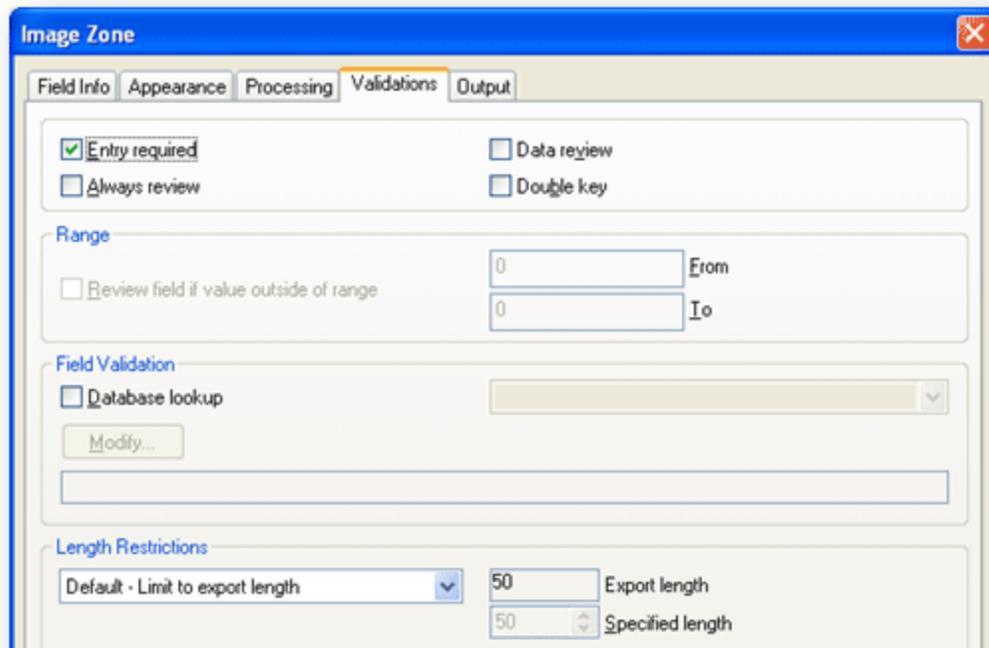
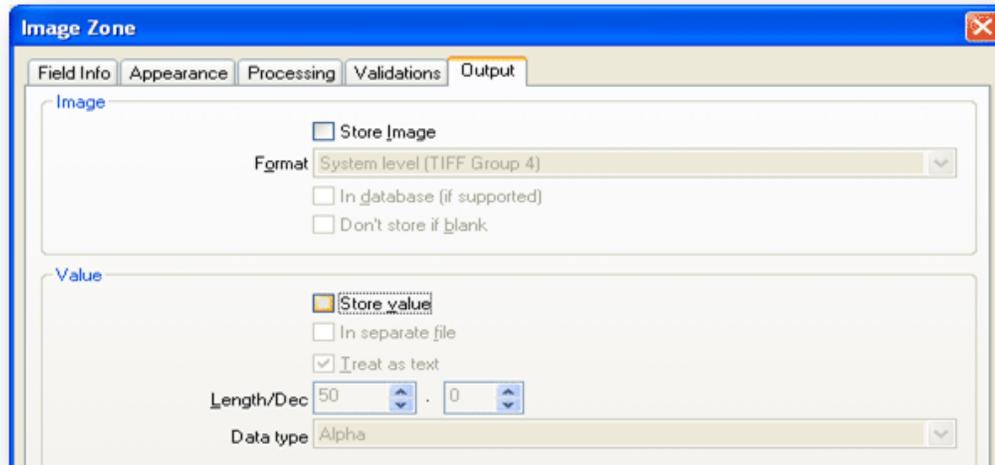
5. Under the Appearance tab, select Show Title and type the text that will appear next to the image zone. You can adjust the positioning of the text as well as the font within this same window.



6. Under the Style tab, select the lines you want displayed around the Image Zone or if you want the Zone transparent. The lines indicate the area in which the information to be obtained will be written.
7. Under the Processing tab, select the Engine Settings tab. Under Expected Characters, make the appropriate selections that would indicate the type of characters to be expected i.e. alpha, numeric, alphanumeric, hand or machine print, upper or lower case or special characters.



8. Under the Output tab, select Store Value and input the maximum number of characters to be expected in the Length box.
9. Under the Validations tab, you can make the appropriate selections that might be needed to validate data collected e.g. Entry required means that the form will not be accepted if data is not entered in the field, but will be held for review in the Verifier module.
10. Once you have configured the Image Zone to suit your needs, click OK.



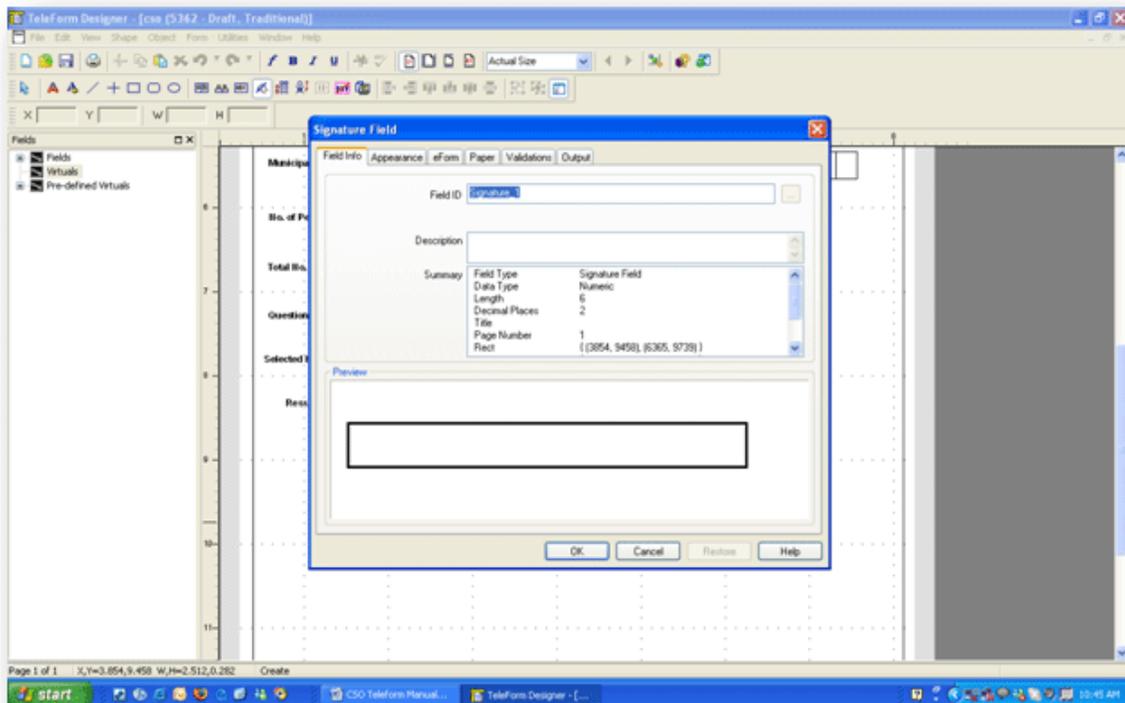
SIGNATURE FIELDS

These fields are similar to Image Zones, but TeleForm does not perform recognition on the data collected in a Signature Field. You can configure these fields to calculate the fill percentage to determine whether it was signed or not, however.

Signature Fields are of particular value on PDF forms, since Adobe Acrobat supports digital signatures

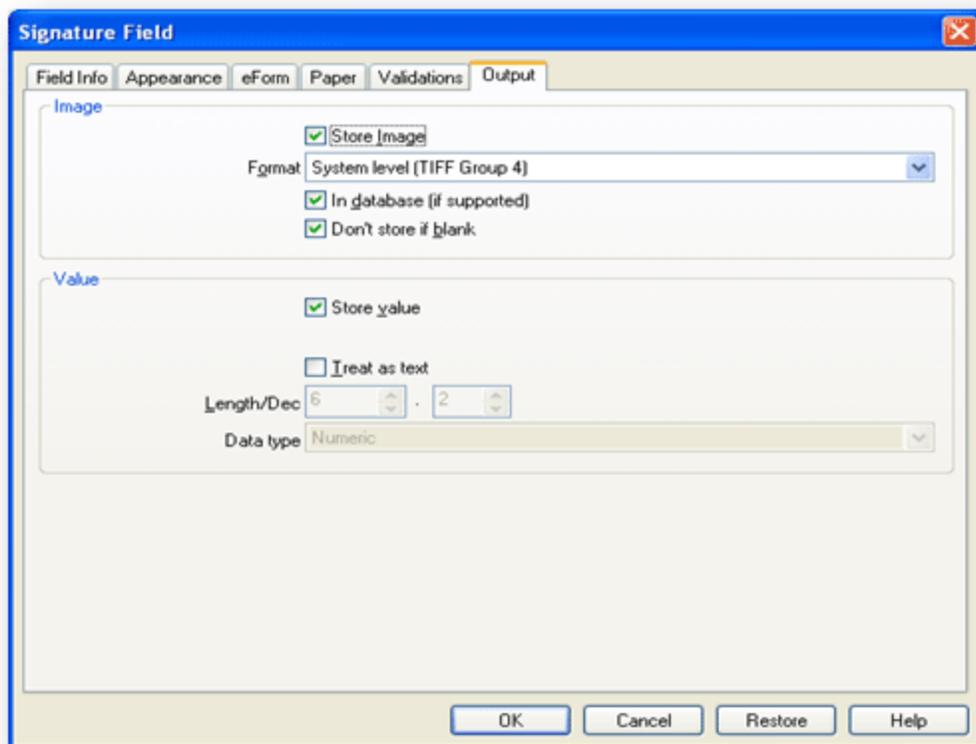
How To Create a Signature Field

1. Open your Form Template in TeleForm Designer.
2. Click the **Signature Field** tool or from the **Shape** menu, click **Signature Field**.
3. The cursor will change to the Signature tool.
4. Click the cursor at the desired location and drag to outline the boundaries of the field.
5. The **Signature Field** dialog box will appear.



6. Under the Field Info tab, type in a name in the Field ID box.
7. Under the Appearance tab, select Show Title and type in the title that will be displayed on the form, next to the field. Make the relevant adjustments to the style of the title.
8. Under the Style tab, select the type of frame you want the signature written in on the form i.e. whether a complete box or just a line.
9. Apply the selections required, if any, under the Validations tab.
10. The following options are available under the Output tab:

- **Store Image** – a separate graphic image of the field will be stored in the TeleForm\IMG subdirectory. Your export database will show the name of the image file under a column named "PCX_Field ID." For example, if the Field ID is "Signature," the path to the image file will be shown in a column named "PCX_Signature." The exported image file will be saved in the specified **Format**.
- **Format** – this list allows you to choose the specific format in which the image collected from the Image Zone or Signature Zone will be saved.
- **In database (if supported)** – if your database supports the storage of images, the graphics files will be saved directly to your database. Your database must be capable of storing Binary Long Object (BLOB) data formats. While many databases can store these formats, they may not have the capability to display the data while in the database.
- **Don't store if blank** – this option avoids the creation of image files of empty fields.
- **Store value** – this option evaluates how much of the field is filled and exports the resulting value to your database. For example, if the returned value occupies 3.9% of the available space in the field, a value of 3.9 would be exported to your database after the form is processed.



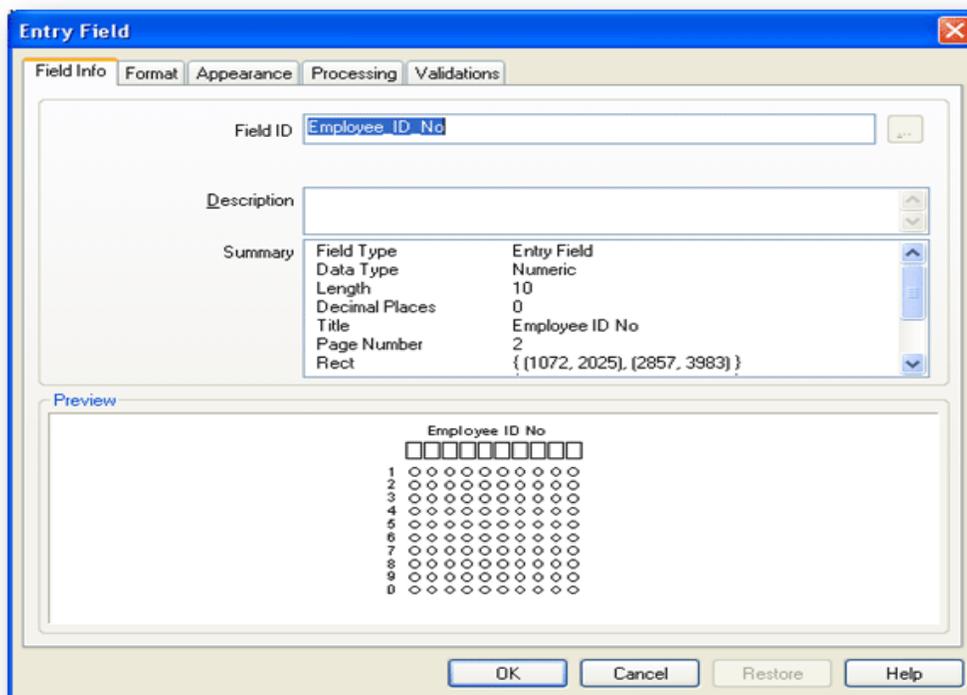


ENTRY FIELDS

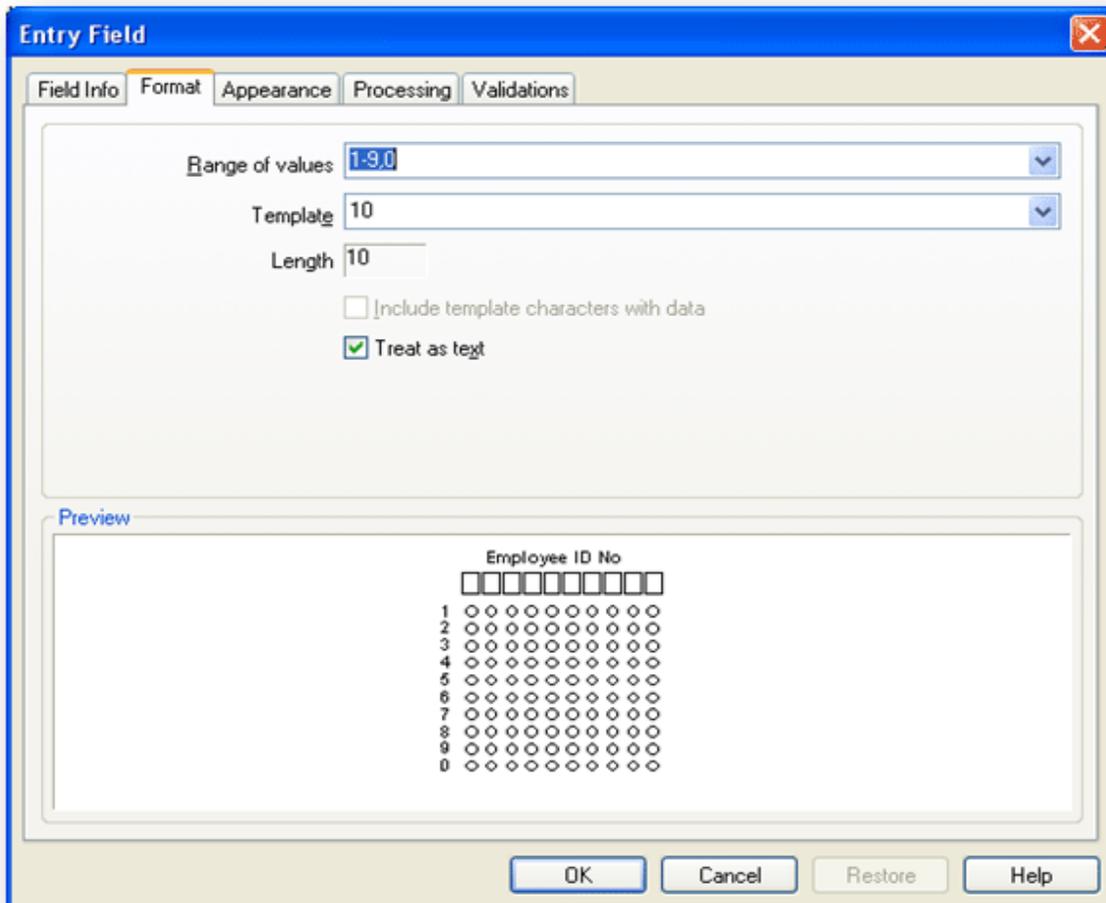
An Entry Field contains rows or columns of “Response Marks” or bubbles where each Response Mark is tied to a specific value. This type of data field is used is commonly used in filling out credit card numbers or any other similar form of information.

How To Create an Entry Field

1. Select the Entry Field toolbar button or Entry from the Shapes menu.
2. Click the cursor on the area of the form on which you want the field to appear.



3. When the Entry Field window appears, select the appropriate field properties as needed.



SIGNATURE FIELDS

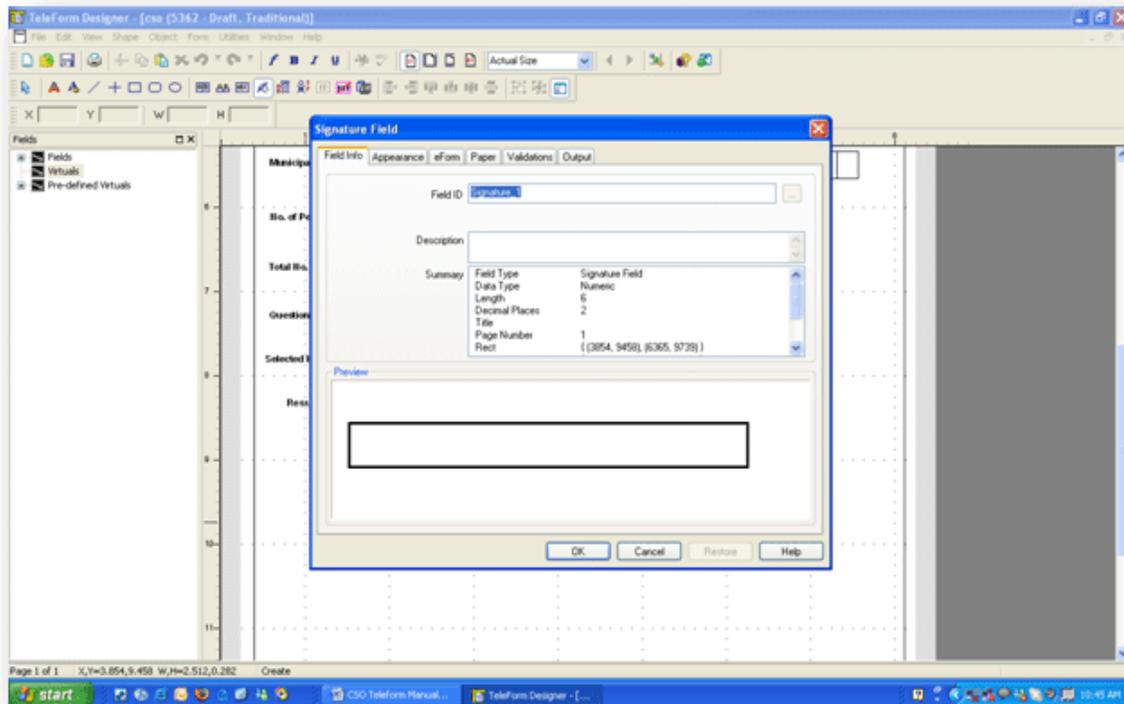
These fields are similar to Image Zones, but TeleForm does not perform recognition on the data collected in a Signature Field. You can configure these fields to calculate the fill percentage to determine whether it was signed or not, however.

Signature Fields are of particular value on PDF forms, since Adobe Acrobat supports digital signatures

How To Create a Signature Field

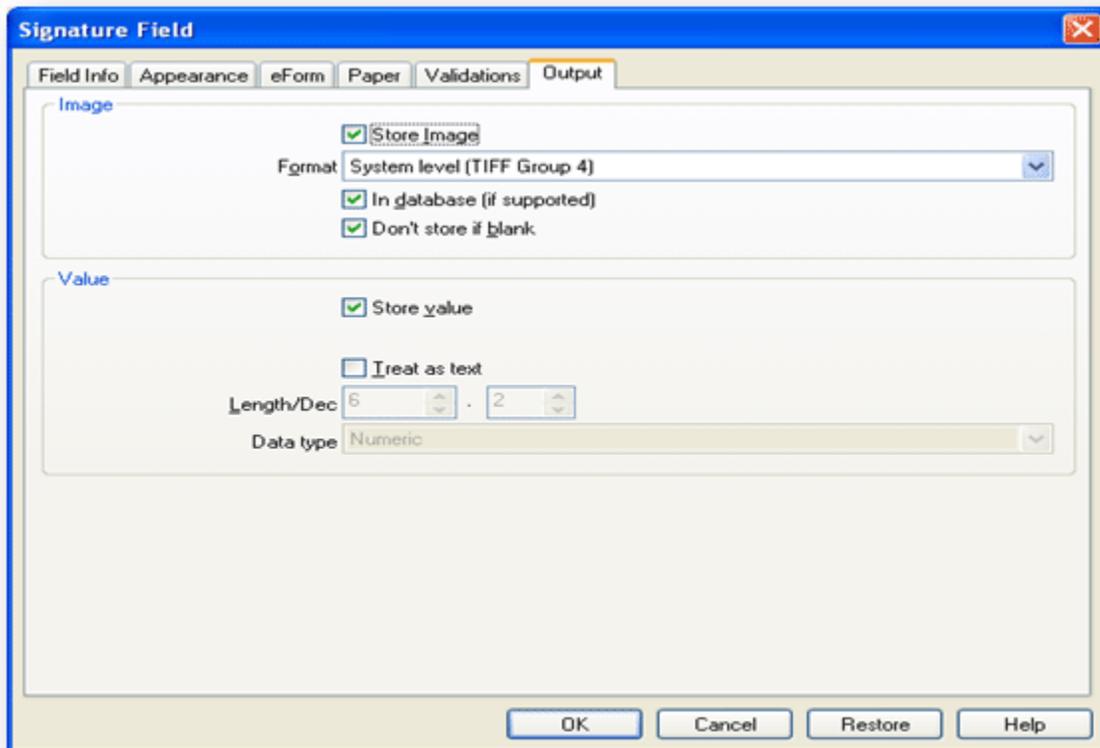
1. Open your Form Template in TeleForm Designer.
2. Click the **Signature Field** tool or from the **Shape** menu, click **Signature Field**.

3. The cursor will change to the Signature tool.
4. Click the cursor at the desired location and drag to outline the boundaries of the field.
5. The **Signature Field** dialog box will appear.



6. Under the Field Info tab, type in a name in the Field ID box.
7. Under the Appearance tab, select Show Title and type in the title that will be displayed on the form, next to the field. Make the relevant adjustments to the style of the title.
8. Under the Style tab, select the type of frame you want the signature written in on the form i.e. whether a complete box or just a line.
9. Apply the selections required, if any, under the Validations tab.
10. The following options are available under the Output tab:
 - **Store Image** – a separate graphic image of the field will be stored in the TeleForm\IMG subdirectory. Your export database will show the name of the image file under a column named "PCX_Field ID." For example, if the Field ID is "Signature," the path to the image file will be shown in a column named "PCX_Signature." The exported image file will be saved in the specified **Format**.

- **Format** – this list allows you to choose the specific format in which the image collected from the Image Zone or Signature Zone will be saved.
- **In database (if supported)** – if your database supports the storage of images, the graphics files will be saved directly to your database. Your database must be capable of storing Binary Long Object (BLOB) data formats. While many databases can store these formats, they may not have the capability to display the data while in the database.
- **Don't store if blank** – this option avoids the creation of image files of empty fields.
- **Store value** – this option evaluates how much of the field is filled and exports the resulting value to your database. For example, if the returned value occupies 3.9% of the available space in the field, a value of 3.9 would be exported to your database after the form is processed.



DETAIL GROUPS

Detail Groups allow you to instantly create repetitious rows of data entry fields. Rather than creating 20 separate data entry fields, you can create the first row of four data entry fields, then build a Detail Group from these items.

The information collected from a Detail Group is exported to a separate database file from the other data on the Form Template. Each row of the Detail Group becomes a separate record in this "extra" database file.

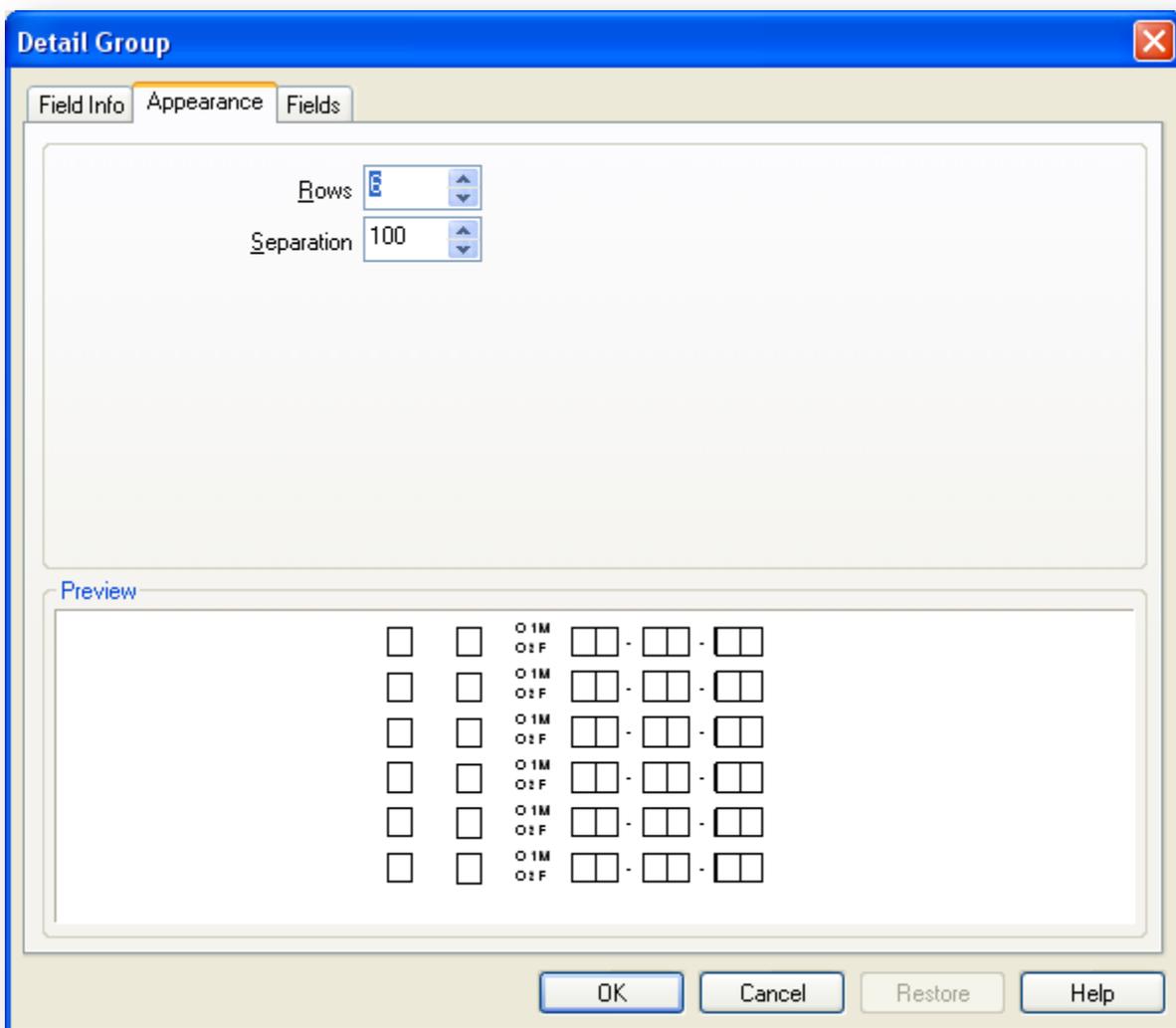
How To Create A Detail Group

1. Add the first row of data entry fields to your Form Template. These fields can consist of all of the data entry fields except for Capture Zone. This row will be repeated to make up the Detail Group.
2. Do not add **headings** to the data entry fields in the first row unless you want them displayed in every row. Create headings from text object tool.
3. Any validation, processing, output or other properties you set for the data entry fields will be applied throughout the Detail group.

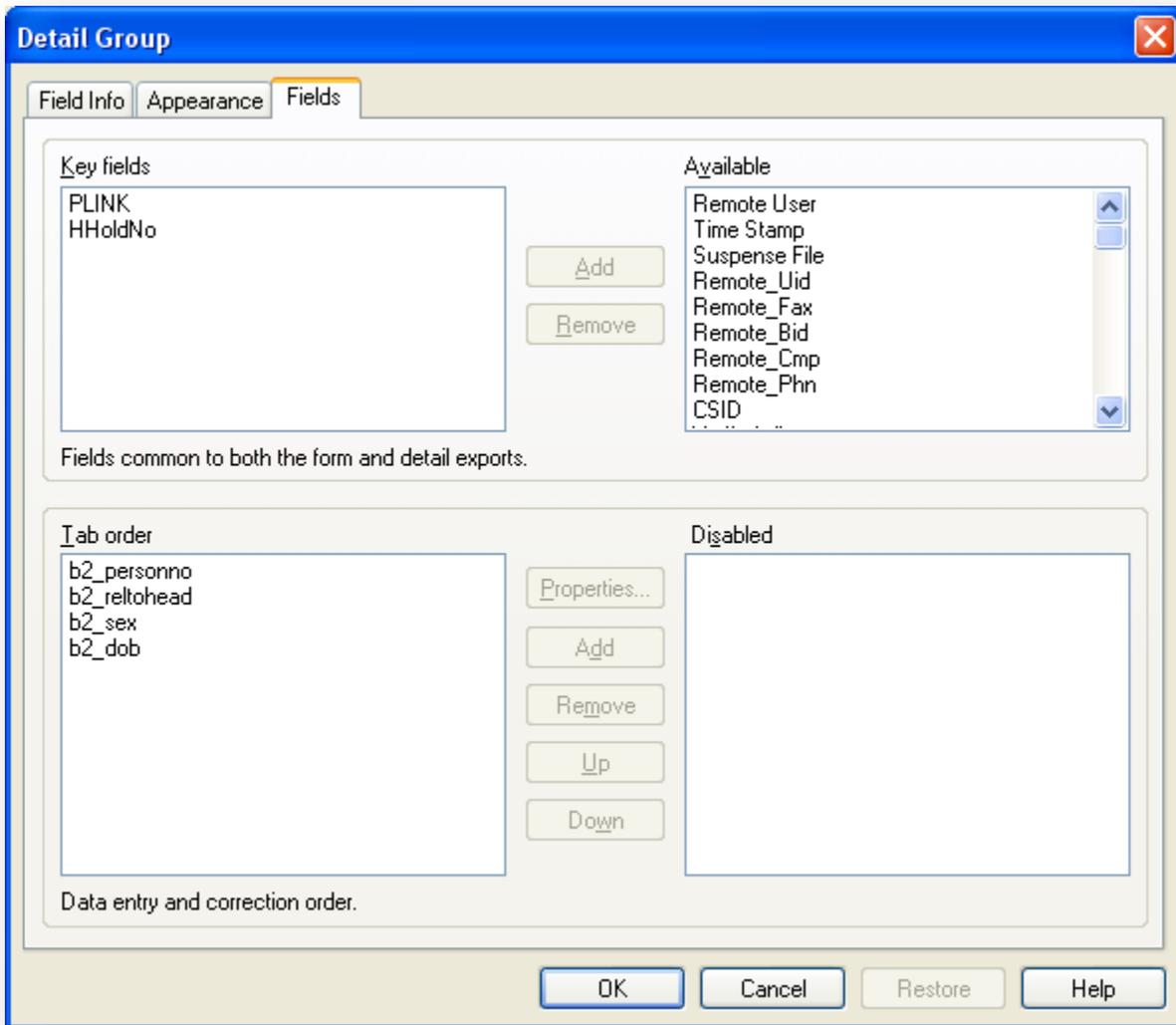
Person No.	Relation to Head	Sex	Date of Birth (dd-mm-yy)	CODES - Relation to Head:
<input type="text"/>	<input type="text"/>	<input type="radio"/> 1 M <input type="radio"/> 2 F	<input type="text"/> - <input type="text"/> - <input type="text"/>	1. Head 2. Spouse 3. Child 4. Parent

4. Select all the fields in the row. You can band around them with the cursor or hold down the CTRL key and click each field.
5. On the **Object** menu, click **Make Group — Detail Group**. The Detail Group dialogue box will appear.

6. On the **Field Info** tab, type a descriptive **Field ID** for the Detail Group. You can add a text Description of the Detail Group as well.
7. Click the **Appearance** tab.
8. In the **Rows** box, type in the number of copies of the first row you require.
9. The **Separation** setting defines how much space will be inserted between each row. It is measured in 1000ths of an inch.



10. One or more of the regular data entry fields on the Form Template must be designated as Key Fields. These fields link the data collected from the main parts of the Form Template to the data collected in the Detail Group since this latter data is exported to a separate file. Data collected from **Key Fields** is exported to the Detail Group's database file as well as the Form Template's regular database file, providing a common link between databases.
11. Select a field from the **Available** list and click the **Add** button. The field will appear in the **Key Fields** list. Repeat this step for every field that you wish to use as a Key Field.
12. To remove a **Key Field**, select it from the **Key Fields** list and click the **Remove** button.



How To Edit Fields in a Detail Group

1. Click the **Fields** tab on the **Detail Group** dialog box.
2. Select a field in the **Tab order** or **Disabled** windows.
3. Click **Properties**.
4. The selected data entry field's **Properties** dialog box will open.
5. Edit the field's properties as needed.
6. Click OK and the Detail Group dialogue box.

How To Set The Tab Order In A Detail Group

The Tab Order defines the sequence in which fields within a Detail Group will be visited if they are held for review in Verifier. Typically, a Detail Group is set up to read from left to right, which is easy for a Verifier operator to process.

1. Open the **Fields** tab on the **Detail Group** dialog box.
2. Use the **Add** button to move fields from the **Disabled** list to the **Tab order** list.
3. Use the **Remove** button to move fields from the **Tab order** list to the **Disabled** list.
4. Use the **Up** or **Down** buttons to change the sequence of fields in the Tab Order list. The first field listed in the **Tab order** window will be the first field seen by a Verifier operator if the Detail Group is held for review.
5. Click **OK**.

DATA GROUPS

A Data Group is a combination of data entry fields (except Capture Zone) that are grouped together and whose values are exported to a single data group column in a database. Data Groups put together fields that have been split into several data fields. You can create a Data Group that combines two individual fields for an address or three individual fields for collecting information on day, month and year. When the Data Group field is exported, it will store a single date value in the database.

Data entry fields in a Data Group retain their individual properties. You can edit the attributes of each component field without first breaking the group.

How to Create a Data Group

1. Select each of the fields that you wish to include in the data group. You can select any combination of data entry field.
2. On the **Object** menu, point to **Make Group** and then click **Data Group**. The **Data Group** dialog box will appear.
3. In the **Field ID** box, enter a name for this data group.
4. To change the order in which the data from a field will be exported, select it from the **Data fields** list and click the **Up** or **Down** buttons. These buttons do not affect the physical layout of the fields on the Form Template.

The screenshot shows the 'Data Group' dialog box with the following details:

- Field ID:** Name
- Data fields:** b1_Surname, b1_FirstName
- Separator:** (empty)
- Output example:** A grid of 51 diamond-shaped characters.
- Data length:** 51
- Treat as text
- Preview:** A grid with two rows: 'Surname' and 'First Name', each with 25 columns.

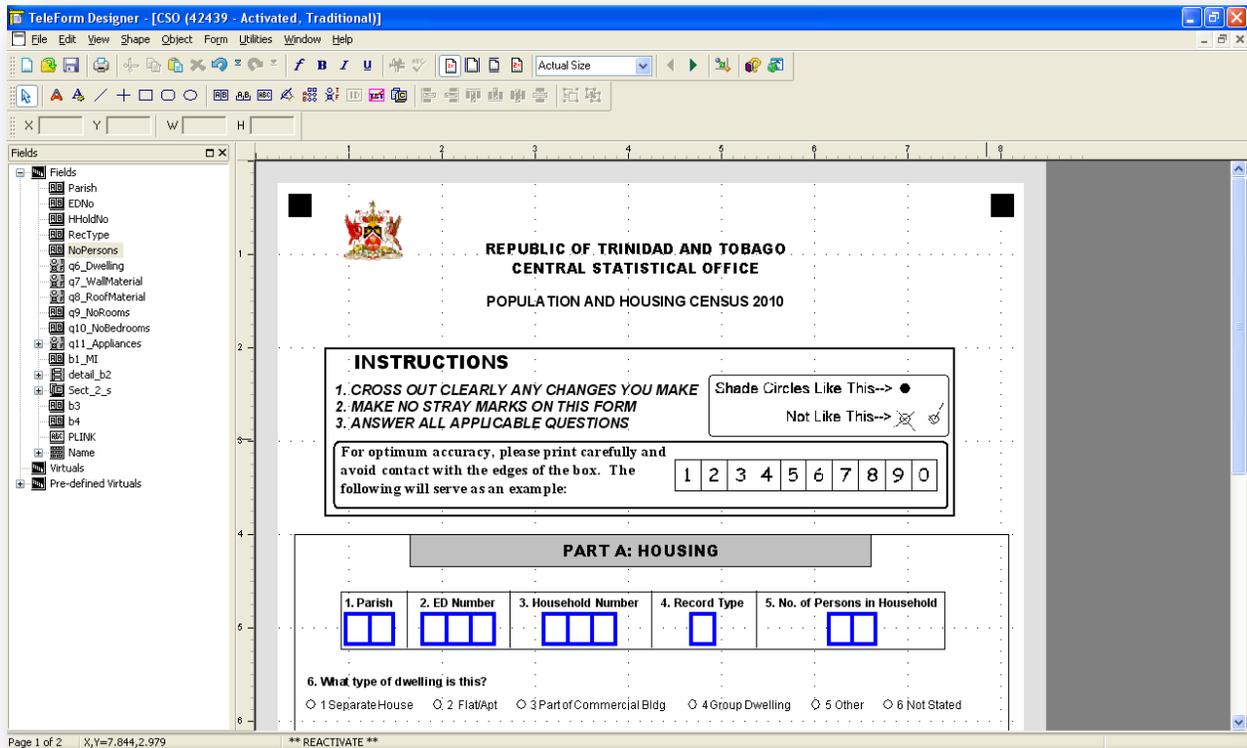
DROPOUT COLOURS

Dropout colours are printed in special color ink that is "invisible" to your scanner because the scanner is equipped with a colored bulb. Using a properly configured scanner, the coloured background disappears and the Reader sees only the data.

An example of when dropout colours are most effectively used is in the case of constrained fields that have been configured for hand recognition and where there is the high possibility that handwriting would touch the edges of the constrained boxes. After these fields have been scanned, the Reader removes the lines around the data so that pieces of data would be lost. These fields would then have to be sent to the Verifier to be corrected. Dropout colours would ensure that all data written into the constrained fields are captured by the Reader.

How to Create Dropout Colours

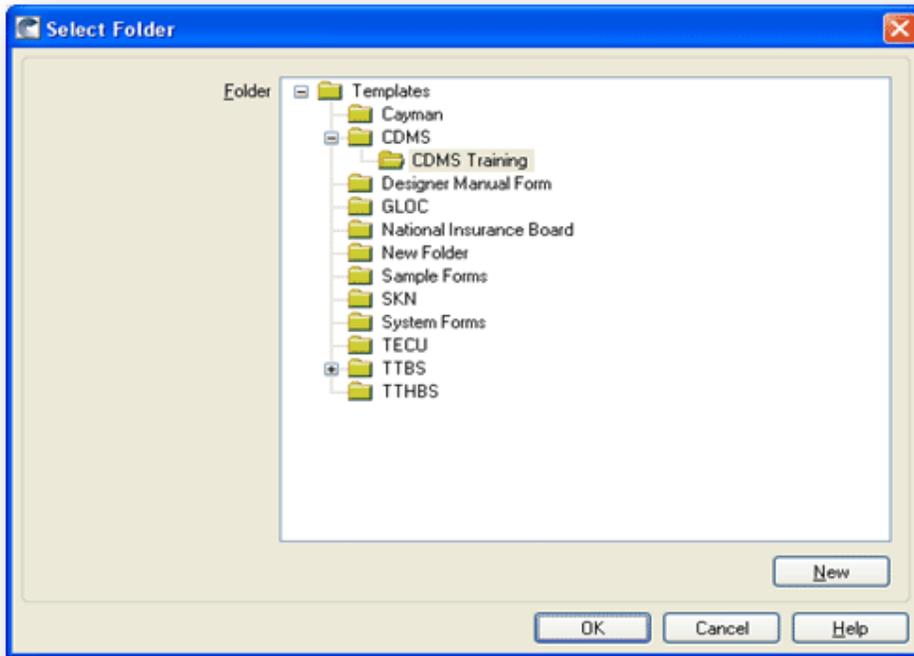
1. Select the data field you want in dropout colours.
2. Under Form, select Dropout forms – colours. A colour palette will appear from which you choose the colour you want to use. Blue and red are the colours used for dropout colours.
3. Under Object, select Drop Out. This will change the colour of the data field.
4. In the Properties of the data field, select the Appearance tab and then the Dimensions tab.
5. In the line width option, select Field level and change the width of the field to thicken the lines of the data field. Click OK.
6. o remove dropout colours, deselect Drop Out under Object and change the line width back to System Level which is 15.



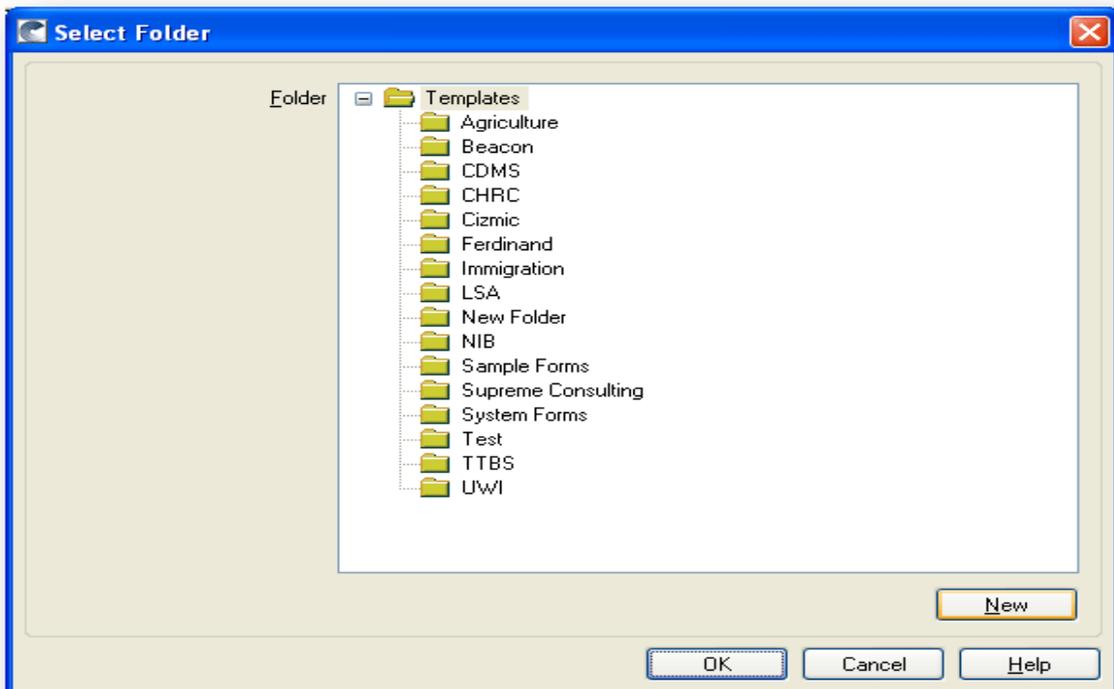
SAVING A FORM

One of the most important tasks to perform once you have started designing a Form Template is to save it. It is advisable that you save your Form Template immediately after setting up the Template.

1. Select **Save** under **File** on the menu bar, or click on the **Save** icon.
2. The **Save As** window opens.
3. Type in a name in the **Title** box. This will be the name of the Form Template.
4. You can fill in **Password** and **Description** if you require special security for the Form Template.
5. Next to the Folder box, click on Select. This will open up the Select Folder window from which you will either create a new folder for your Form Template, or use any other folder that exists in the list of folders.



- When you have chosen a folder in which to save your Form Template, click OK. You will return to the Save As window which will now indicate the name of the Folder in which the Form Template will be saved. Click OK.



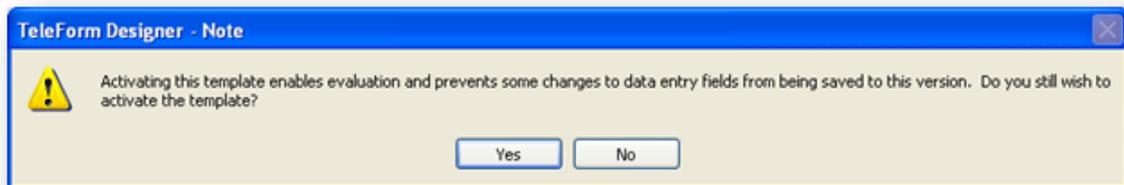
ACTIVATING A FORM

While in the process of designing a Form Template, the form is saved in Draft mode. Once you have completed the design of the Template, you must activate the form in order to release it from the design phase to the production phase i.e. using it to collect information. Teleform cannot process a form unless the matching template has been activated. Forms that have not been activated before distribution will be treated as Non Forms by the Reader.

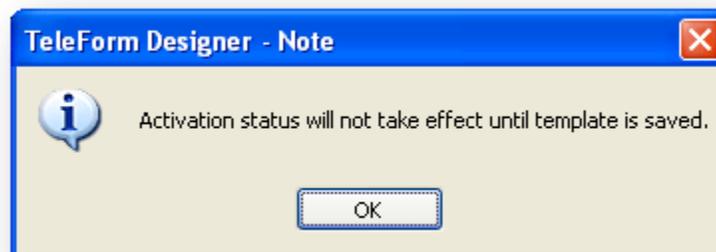
Once a Form Template has been activated, you will not be allowed to add, move, or delete any data entry fields. Because of this, "activating" should be among the last actions you perform on your Form Template. After activation, you should test your form before distributing it for actual use.

How to Activate A Form Template

1. Open the template in Designer.
2. **Save** the template.
3. From the **Form** menu, click **Activate**. The **Activate** command will be unavailable for a Form Template if the template has not been saved yet.
4. Designer notifies you that activating the template will prevent further changes to it.



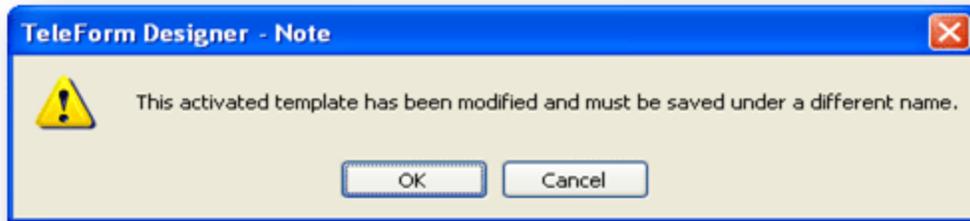
5. Click **Yes**.
6. Another **Note** will appear. Click **OK**.



7. **Save** the template.

Resaving Activated Form Template

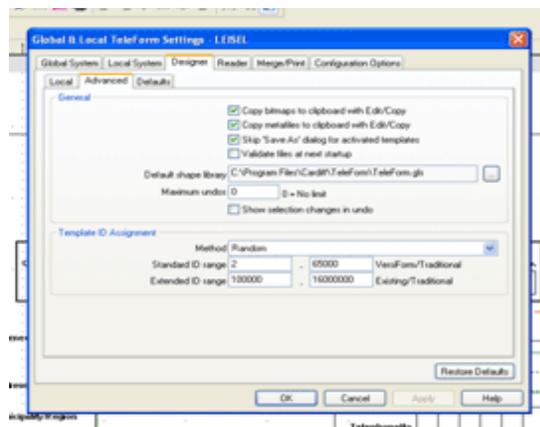
In the event that you have to physically modify data entry fields on the activated Form Template, once you try to save the changes you made, you will be prompted to save the form under a different name.



If you choose to do so, you will have to reactivate the new form.

However, this process can be avoided by overriding the **Save As** feature by doing the following:

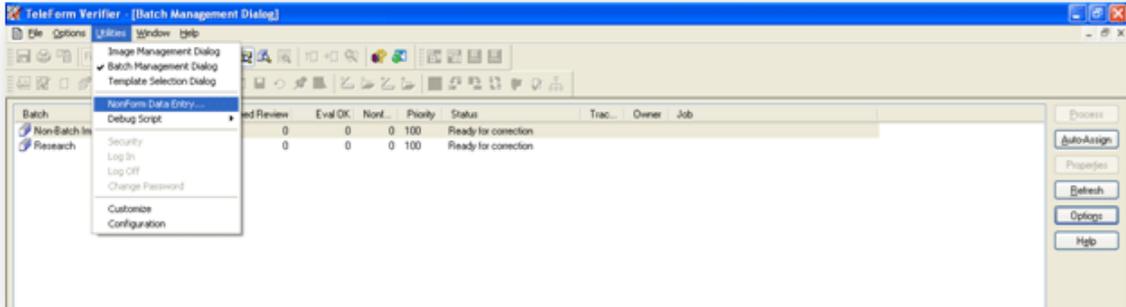
1. Select **Configuration**, under **Utilities** on the menu bar.
2. The **Global and Local Teleform Settings** window will appear. Select the **Designer** tab.
3. Under this tab, select the **Advanced** tab.
4. In the **General** block, select the **Skip 'Save As' dialogue for activated templates** box. Click OK. This disables the **Save As** prompt and allows you to save the changes made on the Form Template.
5. Save the Form.



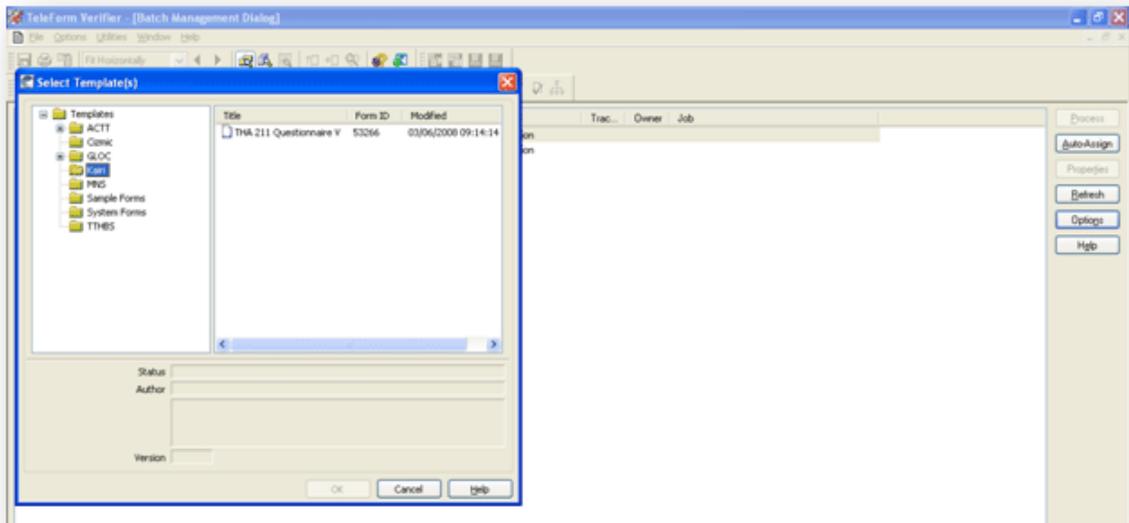
TESTING FORM TEMPLATES BEFORE ACTIVATION

After designing a form template, it is always advisable to test it before activation for its intended use. This would ensure that all fields are collecting the data required and in the manner intended. This process is conducted in the Verifier module.

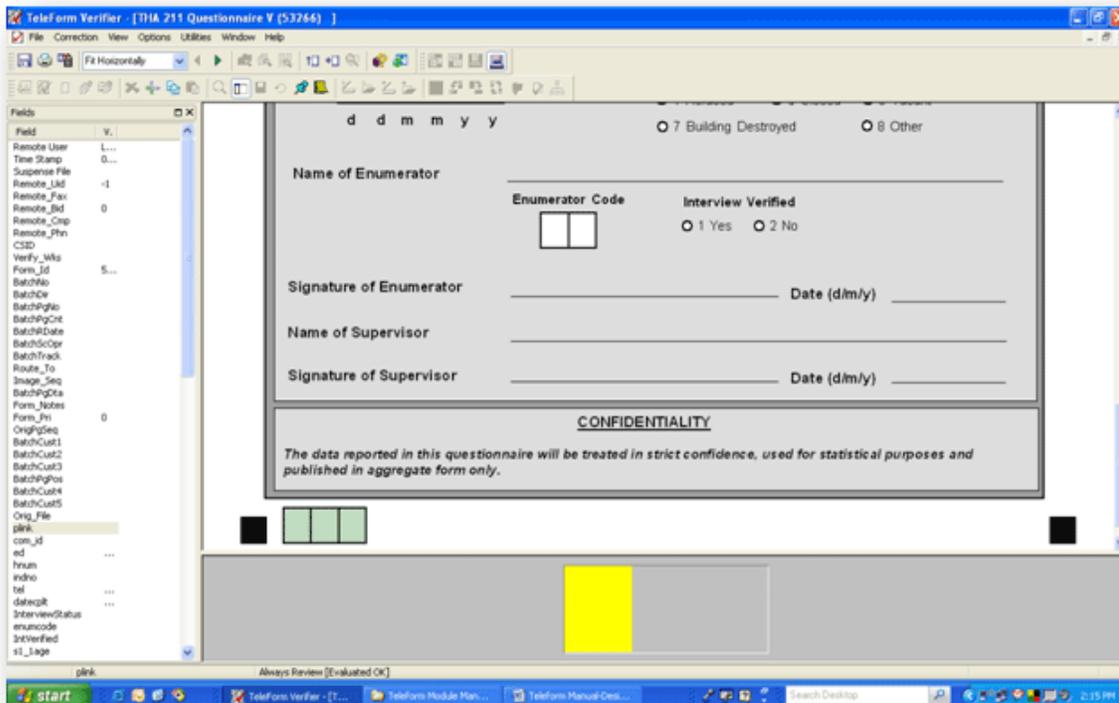
1. Open the **Verifier Module**.
2. Under the **Batch Management Dialog** window, under **Utilities**, select **Non form data entry**.



A Select Template(s) window will appear. This window displays all the Form templates you have created in the Designer Module.



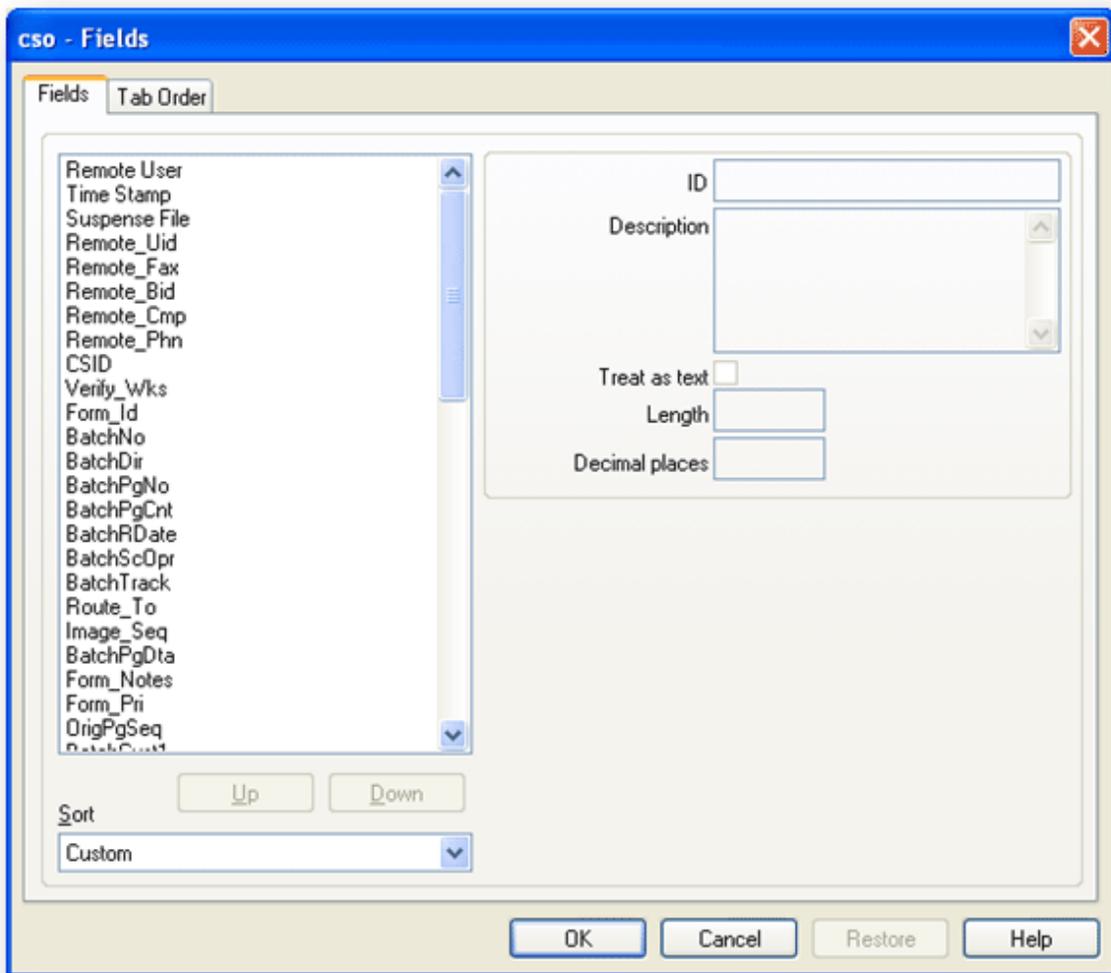
3. Select the Form Template you want to test. Click OK. The form will appear in a new window for you to fill in the fields.



- When you have entered data in all the fields, you will be prompted to Save corrections to results file. Click OK. The data will then be exported to the database you set up in the auto export set up in the Designer Module. You can then view the data to ensure its quality. During the data entry process, you will also be able to pinpoint which fields need adjusting in the Designer module e.g. if a numeric field has been set up to accept alpha characters or if the length of a field needs to be increased.

CHANGING THE DATA ENTRY FIELD ORDER

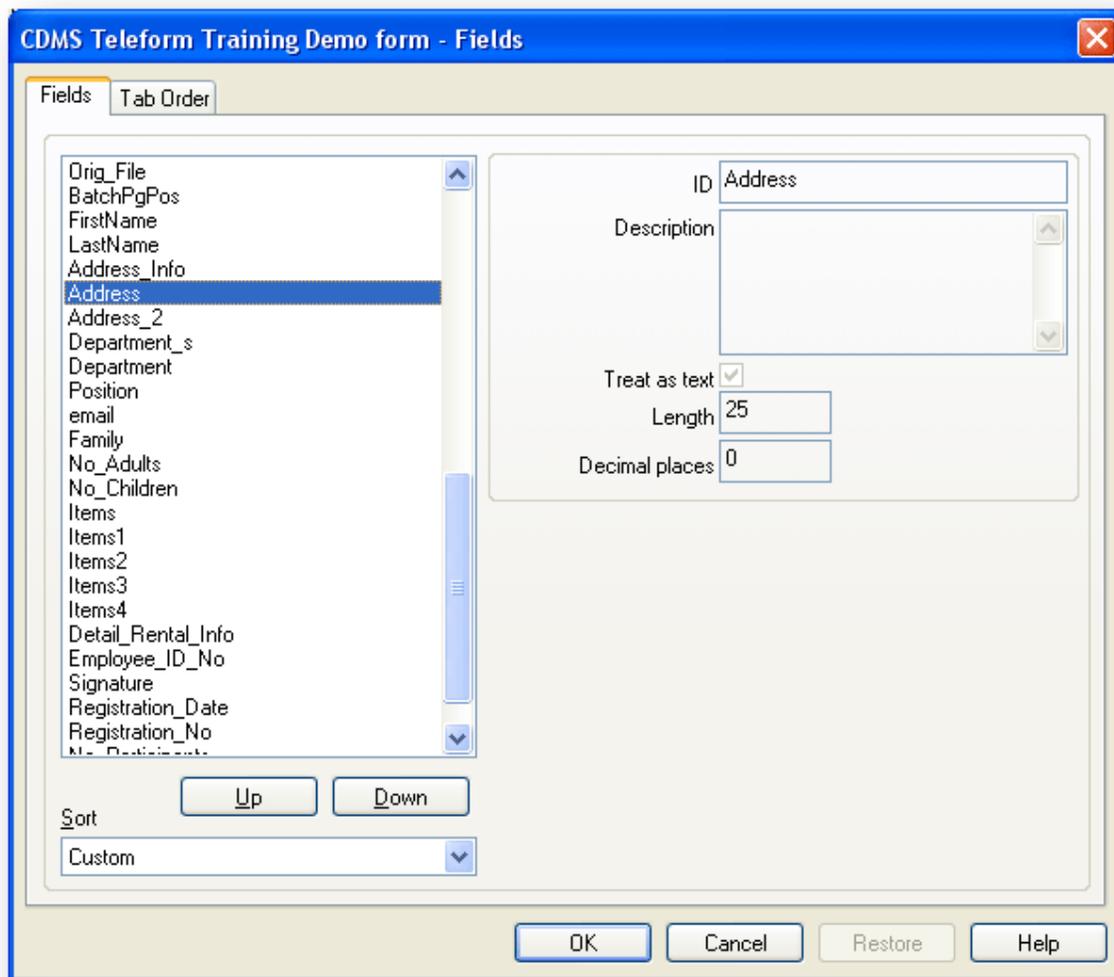
The Data Entry Fields created on the Form Template are viewed in the left column of the Designer window. These fields are also viewed in Fields under Form on the menu bar.



The Fields tab controls the Field Order for the template. The Field Order sets the default field export order for the template. It is based on the order in which fields are added to a template. This order can be modified as required.

How to Change the Field Order

1. Select the field you want to move by clicking on it. To select multiple fields, hold down the CTRL key while you click each one. To select a range of fields, click the first one, hold down the SHIFT key, and click the last one.
2. To move the selected field(s) to a new position in the Field Order, click the Up and Down buttons.
3. The commands in the **Sort** list will change the positions of **ALL** the fields on the template.



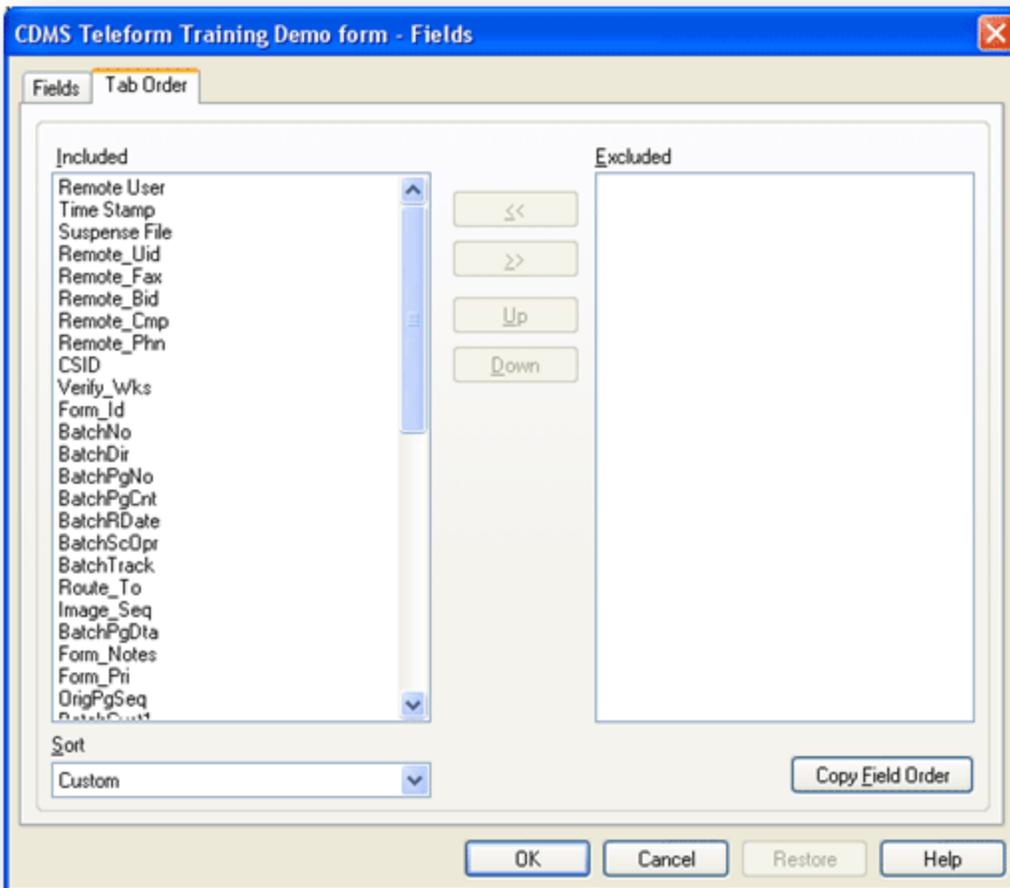
How to Change the Tab Order

The Tab Order defines the order in which the fields on a template will be visited if the template is held for review in Verifier, or if it is exported to HTML or PDF formats. If you do not edit the Tab Order, it will be a duplicate of the Field Order.

1. Select the field you want to move by clicking on it. To select multiple fields, hold down the CTRL key while you click each one. To select a range of fields, click the first one, hold down the SHIFT key, and click the last one.
2. The **Included** column shows every field currently in the Tab Order. Moving any field, including Virtual Fields, to the **Included** column does not mean that a Verifier operator will always have to correct that field if the template is held for review. A data entry field that is part of the Tab Order will only be visited in Verifier when the data collected from it is suspect. Select the field you want

to include or exclude and click on the left or right double arrows to move it from one column to the next.

3. The excluded column shows fields that are not currently part of the Tab Order. These fields will be removed from the Field List when the template is corrected in TeleForm Verifier and respondents will not be able to enter data in these fields if the form is published to PDF format.
4. The commands in the **Sort** list will change the positions of ALL the fields currently Included in the Tab Order. Fields at the top of the **Included** column will be visited in Verifier and on electronic versions of the Form Template earlier than those listed below them.
5. If you click on Copy Field Order, the sequence of fields defined on the **Fields** tab will be automatically copied to the Tab Order. Fields that were excluded from the Tab Order will still be excluded after they are copied from the **Field Order**.

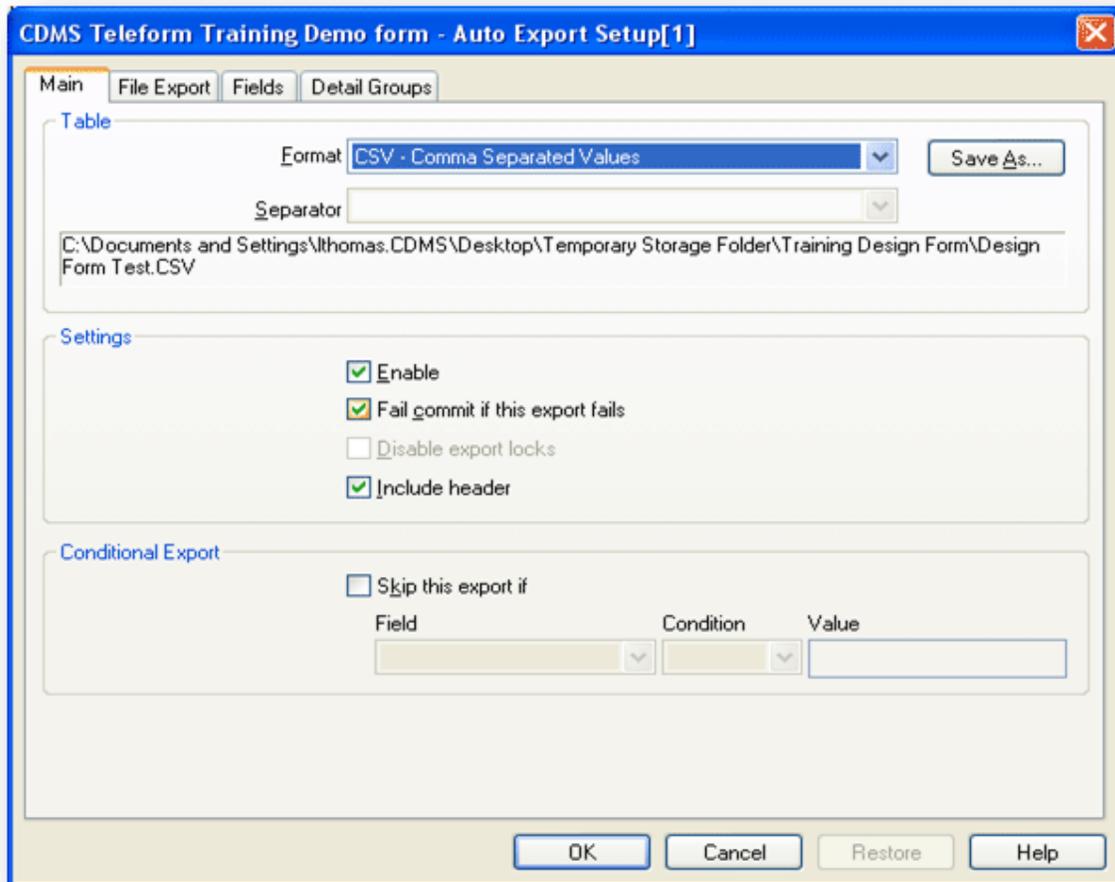


AUTO EXPORTS

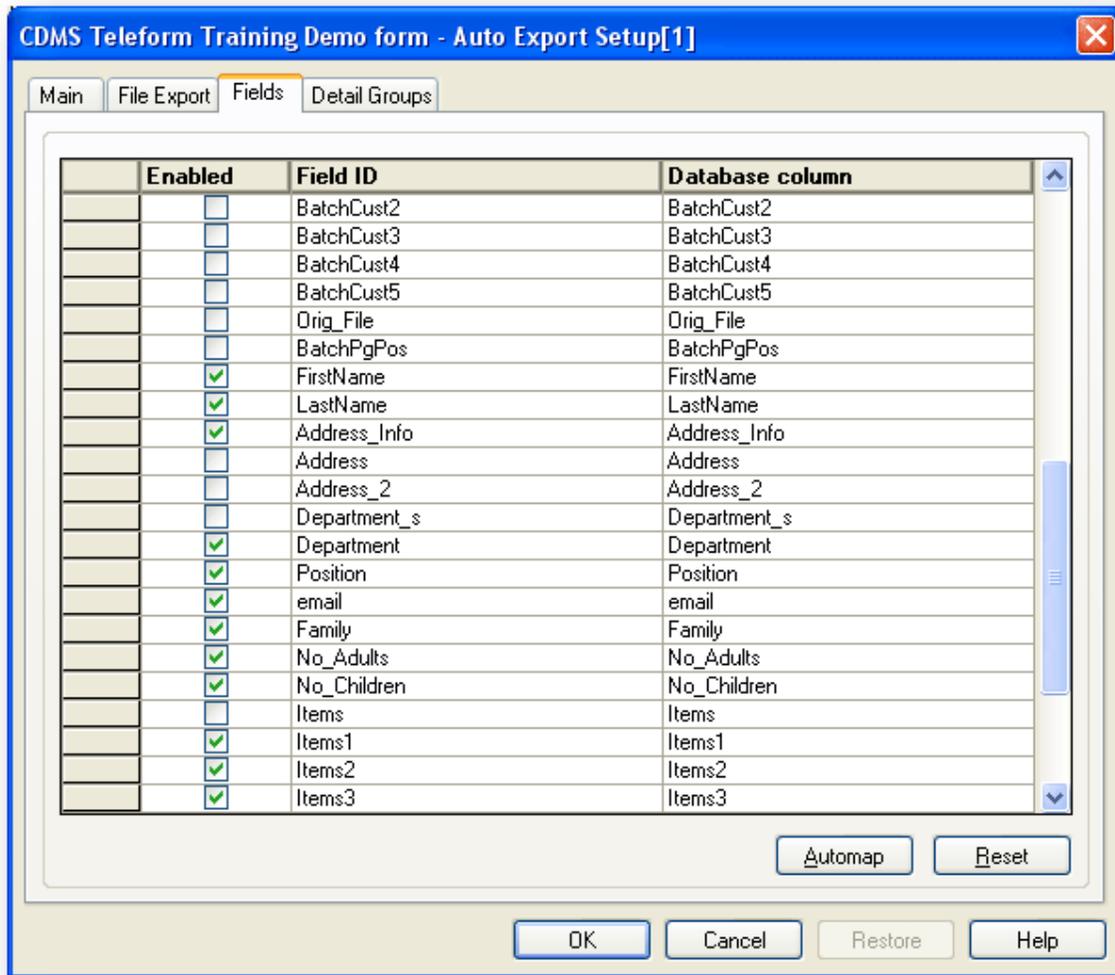
Teleform's Auto Export feature gets the data that has been collected into a database or exports the form as an image into PDF format.

How To Set Up An Export To A Database

1. Open the template in Designer.
2. From the **Form** menu, click **Auto Export Setup** or right-click an empty area of the template and select **Auto Export Setup**.
3. To create a new auto export, click the **New** button. To modify an existing Auto Export, select it and click the **Modify** button.
4. A second **Auto Export Setup** dialog box will appear.
5. Choose a database **Format** and click the **Save as** button. (TeleForm would automatically create most databases from the list. Empty Access and SQL databases will have to be created beforehand as TeleForm does not create these automatically).
6. Select the folder to which you will be exporting the data collected and enter a name in the **File Name** box. Click OK.
7. Select the **Enable** check box to activate the Auto Export.
8. The following **Settings** are optional:
 - **Fail commit if this export fails** – this function works if an item being processed is part of a batch (a set of files processed together instead of separately). When it is enabled, data will be exported up until the point of failure
 - **Disable export locks** – certain export database formats will enable this feature automatically. This allows multiple Verifier stations to export data to the file at the same time.
 - **Include header** – certain export database formats will enable this feature automatically. This feature allows Field ID's to be exported as the first record or row in the database.
 - **Conditional export** – this feature forces TeleForm to skip the Auto Export of a template if the value of a field on that template matches a specified criterion. This function works on the level of individual files, not batches.



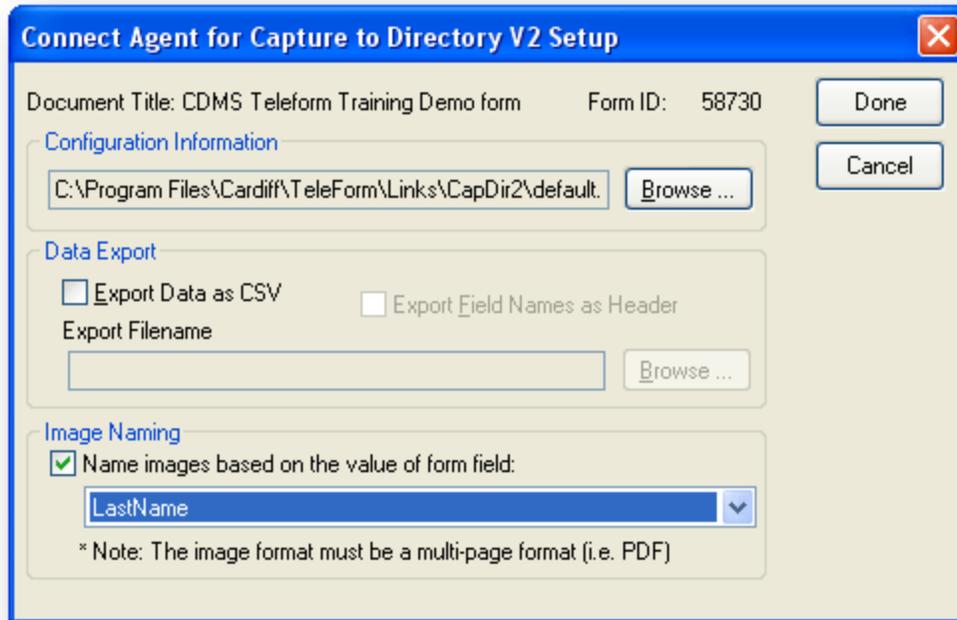
9. Click on Fields tab.
10. Under the **Enabled** column, check the boxes next to the **Field ID** you want exported to the database and uncheck those that you do not want exported. You can select multiple fields and press the SPACEBAR to disable them all. You can also select multiple fields and deselect the **Enable** check box for any one of them. All of the selected fields will then be disabled.
11. Under the **Database** column, you can rename the items in the list if you are setting up an export to a new database. Double click the item you want to rename or highlight it and type the new name.
12. The **Automap** button searches for matches between the database columns and the template fields. When it finds an exact match, it will map the template field to the database column automatically.
13. When you have finished configuring the **Fields** tab, click OK.



How To Set Up An Export To PDF Format

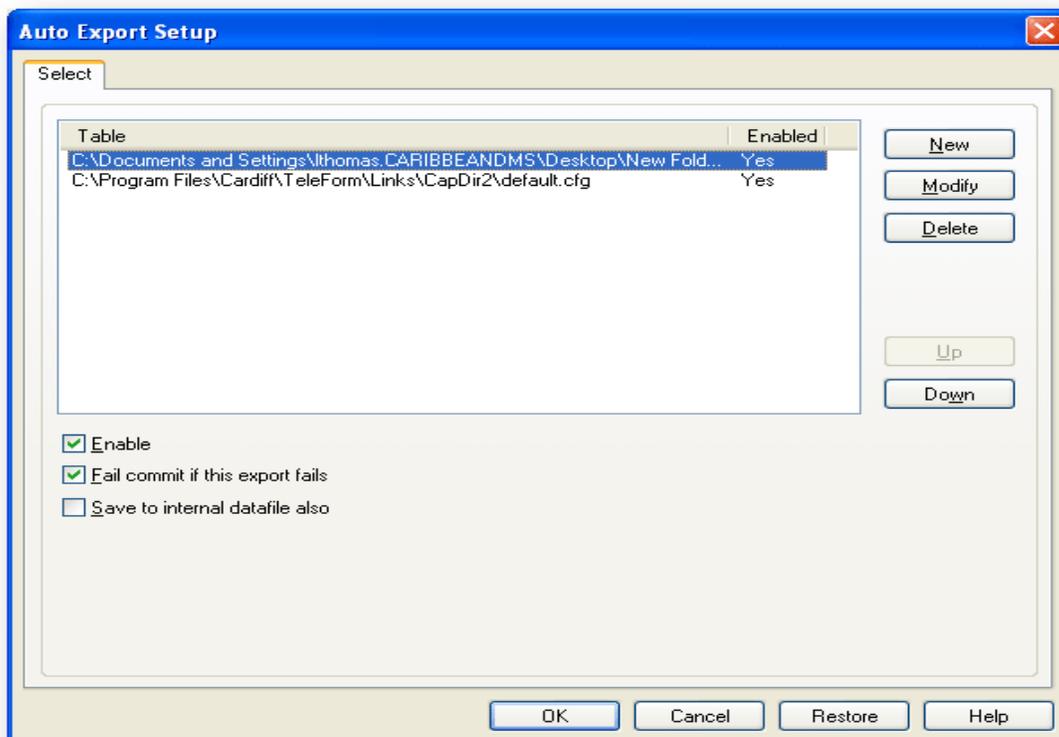
1. Open the template in Designer.
2. From the **Form** menu, click **Auto Export Setup** or right-click an empty area of the template and select **Auto Export Setup**.
3. To create a new auto export, click the **New** button. To modify an existing Auto Export, select it and click the **Modify** button.
4. A second **Auto Export Setup** dialog box will appear.
5. Choose **Capture to directory V2** in the Format box.
6. In the Settings box, choose **Enable**.
7. PDF images can be automatically given unique names when exported. Click **Save As** and under **Image Naming** in the window that opens up, check the box **Name images based on value of**

form field and then select a field. The data from this field will be extracted to name the PDF image exported. Click **Done** when you are finished.



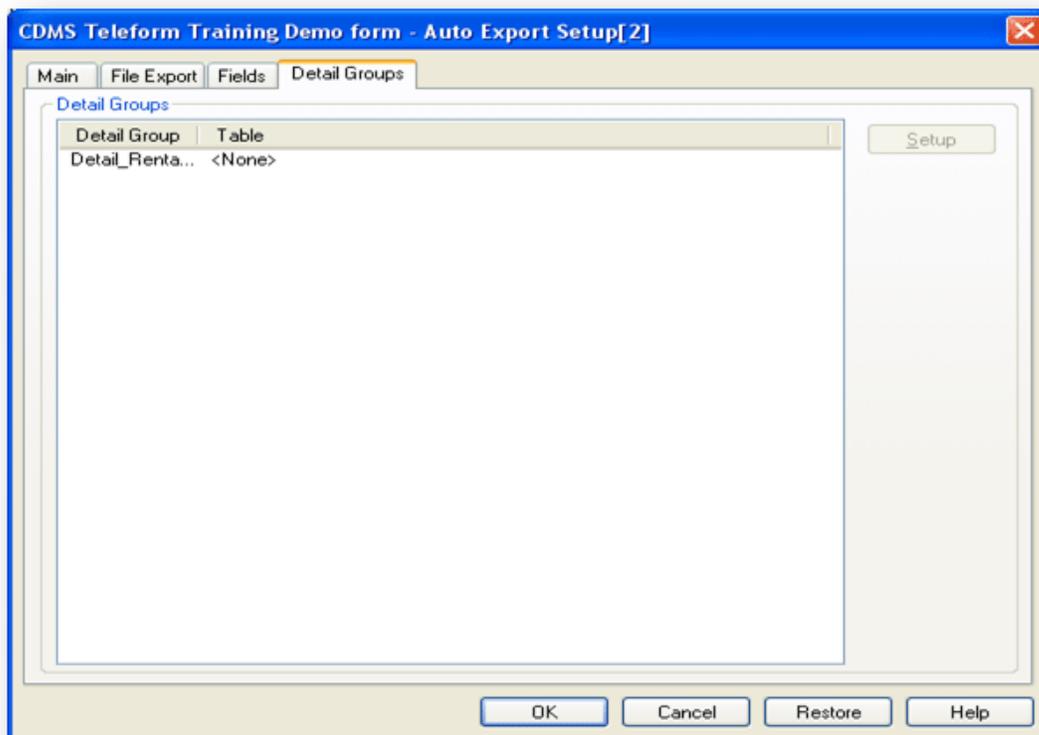
8. Under **File Export**, browse to the directory to which you will be exporting the PDF images.
9. You have the option of checking the **Use the data from this field as a subdirectory** box and selecting a field, the data from which will give an unique name to a subfolder created for the export of the PDF images.
10. Under **Image File Conversion**, select PDF as the format.
11. The default in the **Options** box is monochrome, which means the PDF will be exported in black and white. The other option is colour (if present).
12. The **Page Option** block allows you to specify how the files (images and non-images) associated with the template will be exported. Select **Export** all pages (both forms and non-forms) as you want all the pages in the form template to be printed to PDF.
13. The **Page Order** options define the export order of form/document and attachment images. For PDF export, you can leave this selection on the default (Group form pages at the beginning).
14. Click OK.
15. Note that in order to be able to select a field for either the naming of the PDF image or the creation of a subfolder, at least one field must be enabled under the **Fields** tab.
16. Once back in the **Auto Export Setup** window, click OK to exit.

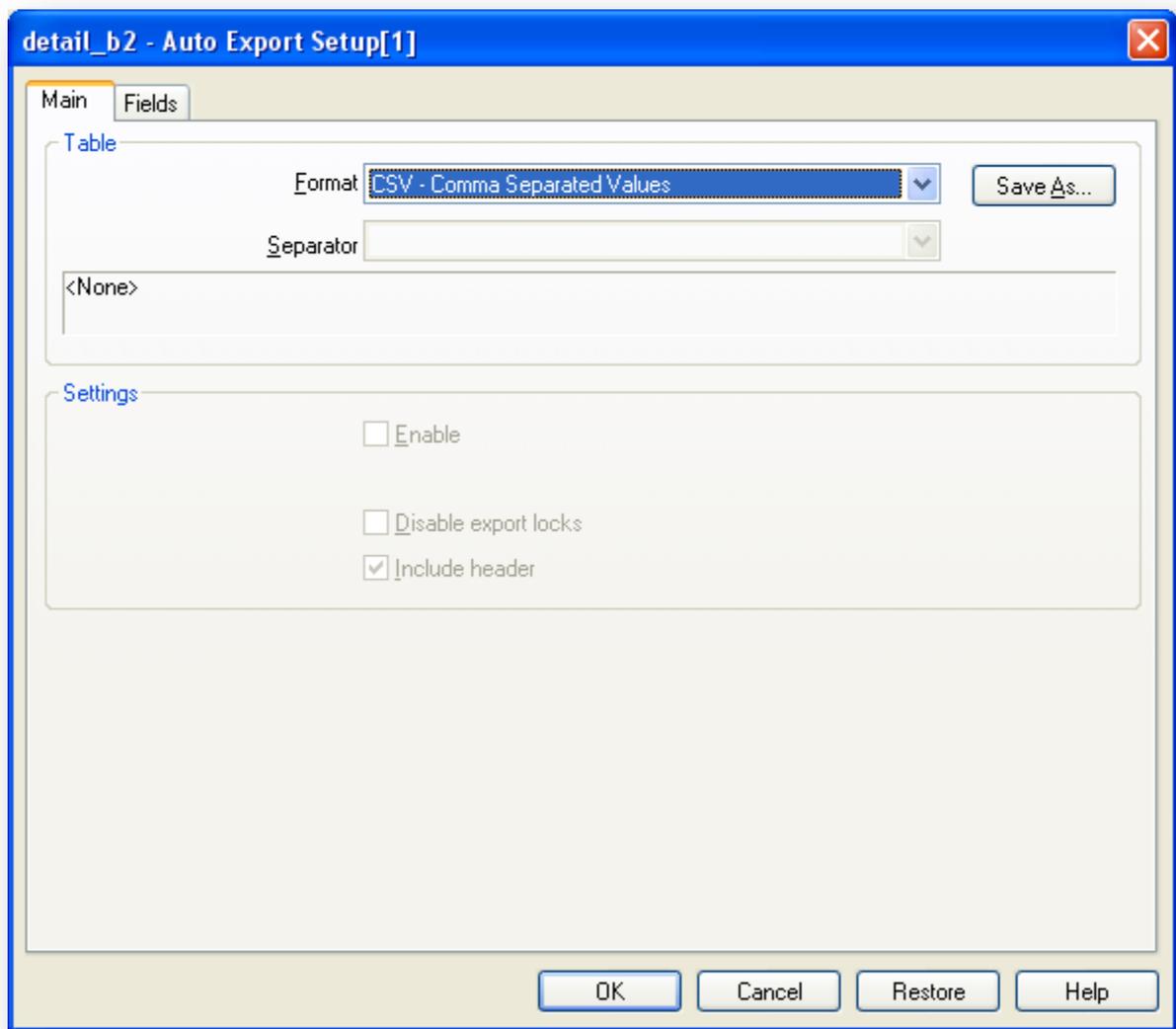
17. Under **File Export**, browse to the directory to which you will be exporting the PDF images.
18. You have the option of checking the **Use the data from this field as a subdirectory** box and selecting a field, the data from which will give an unique name to a subfolder created for the export of the PDF images.
19. Under **Image File Conversion**, select PDF as the format.
20. The default in the **Options** box is monochrome, which means the PDF will be exported in black and white. The other option is colour (if present).
21. The **Page Option** block allows you to specify how the files (images and non-images) associated with the template will be exported. Select **Export** all pages (both forms and non-forms) as you want all the pages in the form template to be printed to PDF.
22. The **Page Order** options define the export order of form/document and attachment images. For PDF export, you can leave this selection on the default (Group form pages at the beginning).
23. Click OK.
24. Note that in order to be able to select a field for either the naming of the PDF image or the creation of a subfolder, at least one field must be enabled under the **Fields** tab.
25. Once back in the **Auto Export Setup** window, click OK to exit.



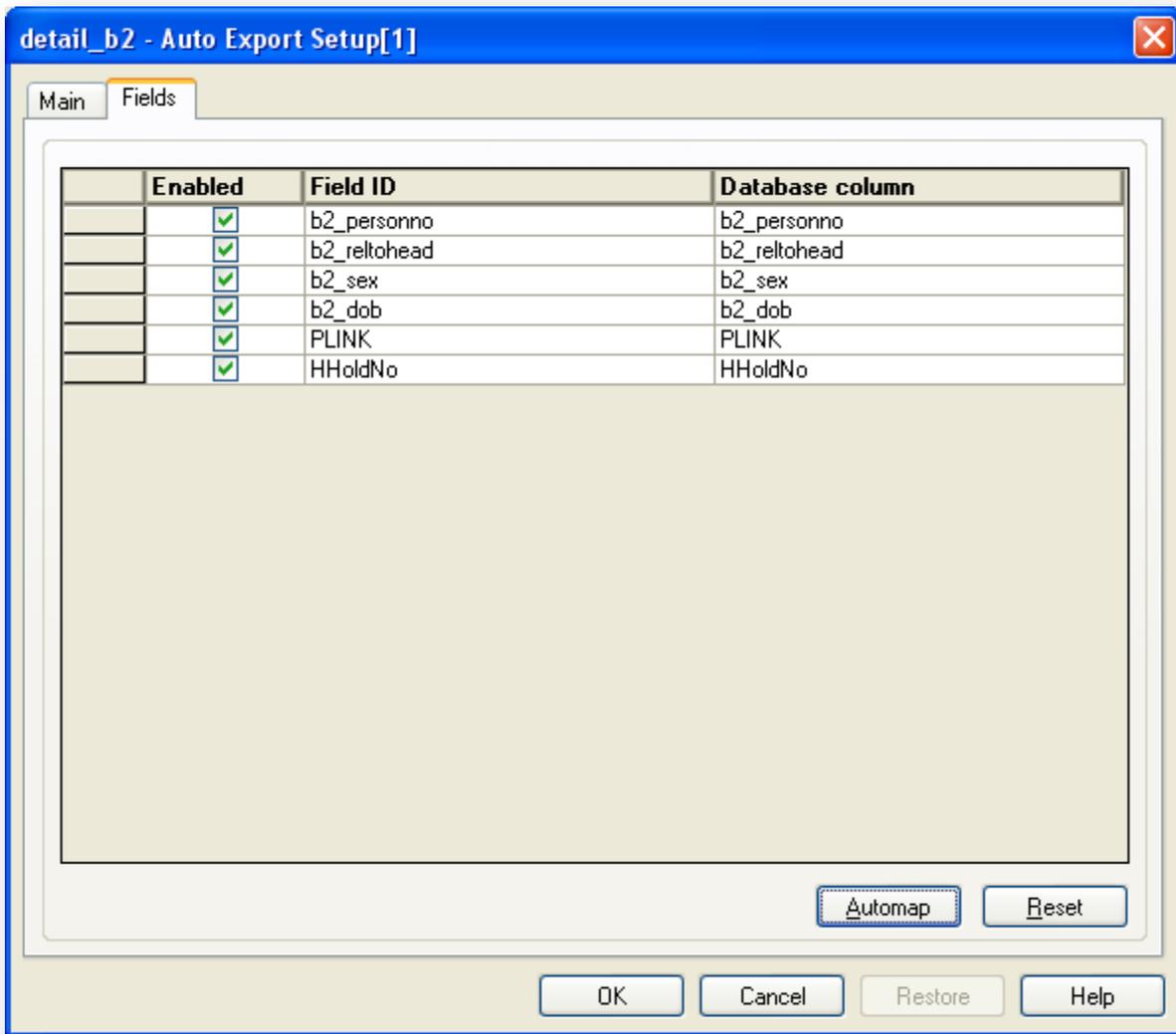
How To Set Up The Export For Detail Groups

1. Open the Form Template in TeleForm Designer.
2. From the **Form** menu, click **Auto Export Setup**.
3. On the **Auto Export** dialog box, select an Auto Export that has already been configured and click **Modify**.
4. A second **Auto Export Setup** dialog box will appear. Click the **Detail Groups** tab.
5. Select the **Detail Group** and click the **Setup** button.
6. Another **Auto Export Setup** dialog box will appear. This dialog box only affects the selected Detail Group.
7. Make the appropriate settings on the **Main** tab.
8. Click Save As and select the folder to which the Detail Group will be exported.





9. Open the **Fields** tab.
10. Select the **Enabled** check box for each data entry field within the Detail Group. You may choose not to export data from some data entry fields in the Detail Group, but this is rarely done.
11. Click **OK** on the **Auto Export Setup** dialog boxes for the Detail Group and the "parent" Auto Export.
12. Make sure that the "parent" Auto Export is enabled.
13. Save the Form Template.



MULTIPLE PAGE TEMPLATES

How To Insert A New Page

1. Open the Form Template in Designer.
2. From the **Edit** menu, click **Insert Page**.
3. Choose one of these options:
4. Before current page

5. After current page
6. Before first page
7. After last page
8. A new page will be added to the Form Template at the location you specified.

How To Delete A Page

1. Open the Form Template in Designer.
2. Navigate to the page you want to delete.
3. On the **Edit** menu, click **Delete Page**.
4. A **Note** will appear, asking you to confirm that you want to delete the page. Click **Yes**. The page will be deleted.

NB. Once a page is deleted, there is no way to recover the deleted material.

How To Repeat Objects On All Pages

Text, shapes or graphics that are placed on the first page of a Form Template, can be repeated on all subsequent pages. This function is useful in the creation of headers, footers, repetitive instructions and logos.

1. Open the Form Template in Designer.
2. On page 1, select the object you want to repeat on all other pages.
3. On the **Object** menu, click **Repeat on all Pages**. The object will now appear in the same location on every page of the Form Template.

Please note the following:

- ***The Repeat On All Pages function does not apply to data entry fields.***
- ***Repeated objects always appear behind any other objects or text in subsequent pages.***
- ***Only the object on the first page of the Form Template can be moved or edited. The following pages simply mirror what is done to the objects on the first page i.e. the appearance and location of the object.***

How To Improve Identification of Multi-page Form Templates – Page Link Field

A **Page Link** field allows every copy of a returned multi-page Form Template to have a unique value. This unique value allows Teleform to accurately identify what pages belong together and is especially

handy if pages become separated or mixed up during scanning. Page Link fields are therefore used when:

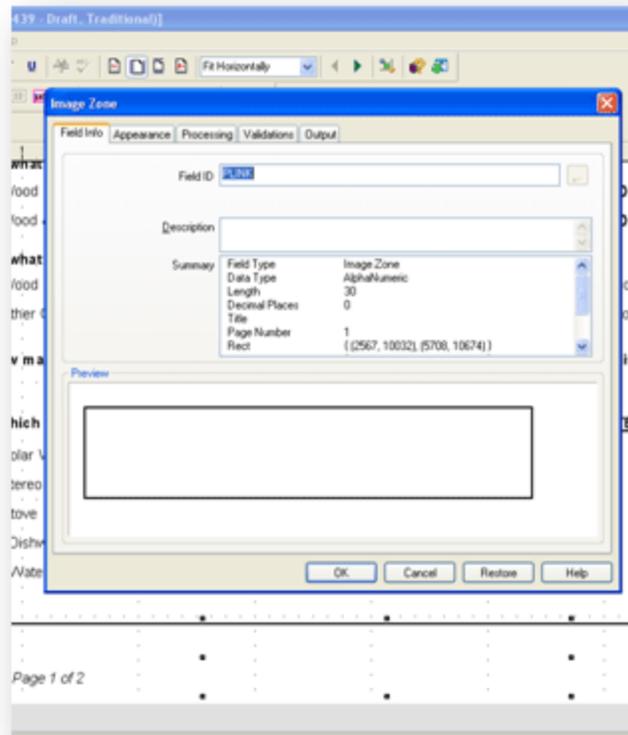
- Processing multi-page forms;
- Portions of a multi-page form are received in separate transmissions; and
- Many forms are scanned at one time, with no separator.

How To Create A Page Link

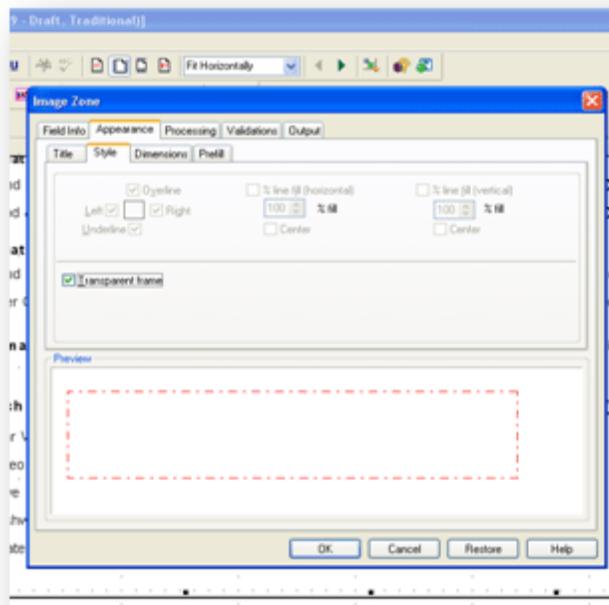
1. Go to page 1 of the Form Template.
2. Create a Constrained Field or Image Zone and place it in an appropriate location on the form, either the top or bottom corners.
3. The Constrained Field would usually contain a numeric value, with the number of boxes equivalent to the number of expected forms to be printed. An Image Zone would remain blank.
4. On the **Object** menu, click **Page Link**. This command will be unavailable if the object you selected is not a data entry field or if you are on any page other than page 1.
5. A check mark appears next to the **Page Link** menu item to indicate that this field has been selected as the Page Link field.
6. The selected data entry field will be repeated on all subsequent pages.
7. Do **NOT** create more than one Page Link field per Form Template.

How To Create A Page Link Using A Barcode

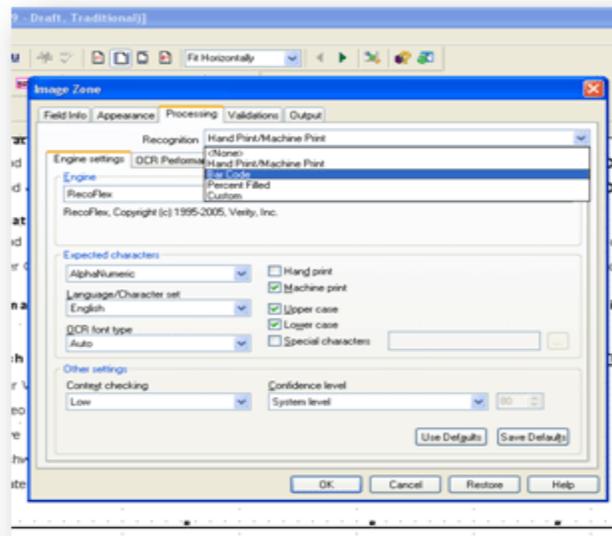
1. Go to page 1 of the Form Template.
2. Create an image zone and place it in an appropriate location on the form, either the top or bottom.
3. Under the Field Info tab in the Image Zone window, name the image in the Field ID box e.g. PLINK to signify page link.



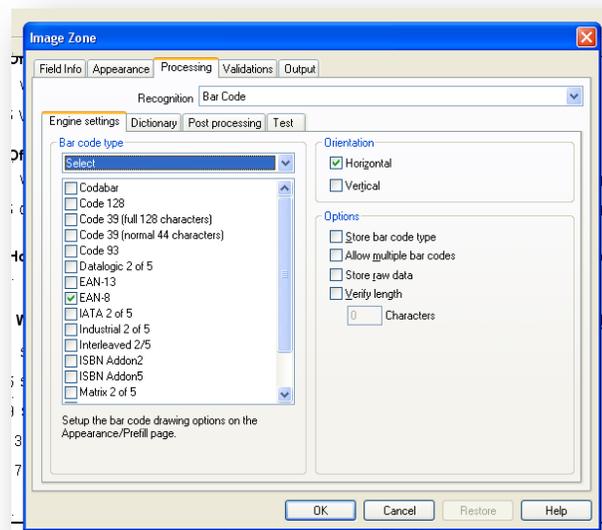
4. Click on the Appearance tab and then the Style tab. Select Transparent frame. This selection makes the Image Zone box invisible on the printed form.



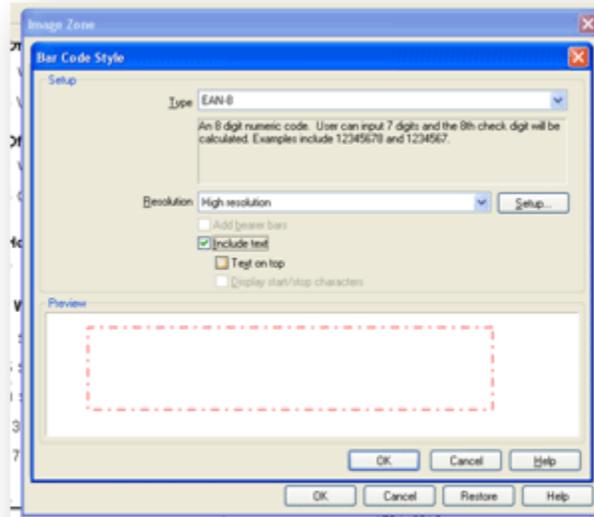
- Click on the Processing tab. In the Recognition box, select Barcode from the dropdown menu. The Engine Setting window will then change to present selections to be made for setting up the barcode on the form template.



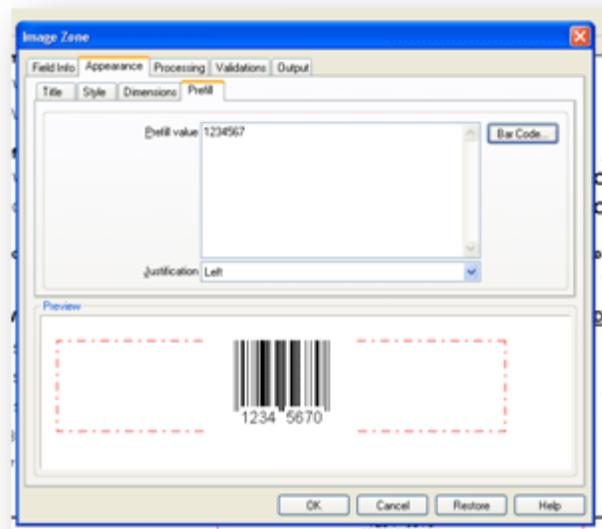
- Under Bar Code Type, choose the option Select. This will allow you to select the type of barcode you prefer to use from a set list. Select EAN 8 from the list. The orientation selection determines if the barcode will be set to read horizontally or vertically on the form template.



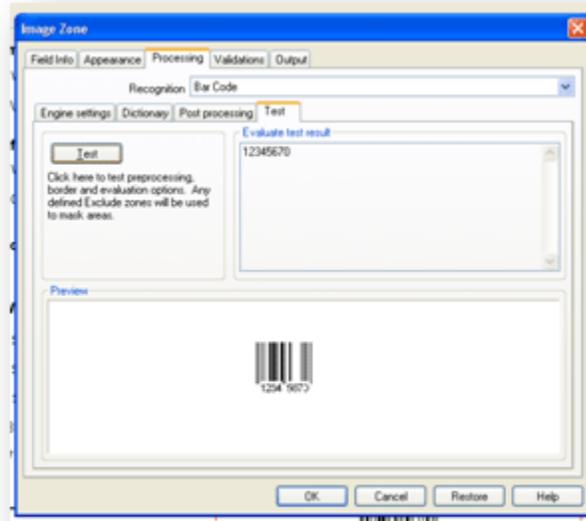
- Click on the Appearance tab and select the Prefill tab. Click the Barcode button.
- The Bar Code Style window appears. The type of barcode you selected will be displayed in the Type box as well as an example of how the barcode is to be structured. You can select the type of resolution for barcode recognition and whether the actual code will be displayed on the Form Template. Click OK.



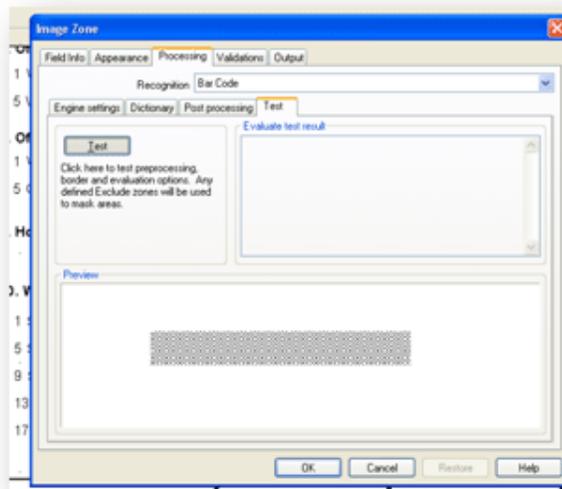
- The Prefill window reappears. Within the Prefill Value box, type in the appropriate number of digits as given in the example in the Bar Code Style window.



- Click the Processing tab and then the Test tab. This Test window allows you to test the barcode you set up to ensure that the barcode was set up properly. When you click the Test button, the Evaluate Test Result window should display the barcode number you typed in the Prefill Value box above. The Preview window also displays what the barcode looks like on the Form Template. Click OK.



- Select the barcode Image Zone. Under Object on the Form Template menu, select Pagelink. The barcode will then become the pagelink and will be repeated on all subsequent pages.
- NB.** If the barcode is not properly created, the Evaluate Test Result window will remain empty and the Preview window will display a patchwork patterned box. This result is usually caused because the size of the Image Zone is too small and has to be enlarged to suit the size of the barcode.



EXISTING FORMS

An existing form is any form that is either not created in the Designer Module, or created in the Designer Module but printed and put into use without being activated. The Existing Form Template allows the external form to be scanned into the Designer and overlays of the various field types to be placed on the areas on the form from which data is to be extracted and placed into a database.

How to Create an Existing Form Template

1. Open Teleform Designer. Under File on the menu bar, select New.
2. A window indicating three types of templates is presented. Select the first choice (Form) and click OK.
3. A Form Type window appears. Select Existing and click Next.
4. In the Existing Form Source window, select whether you will be scanning in an existing image from a directory or scanning new images from a scanner.
5. If scanning from a scanner, select the appropriate page size and orientation in the scanner setting.
6. Click Finish. The background image of the Form Template will appear in the Designer window.
7. Save the form.

New Form Wizard - Existing Form Source

Preview

ATTENDEE GUEST REGISTRATION FORM
COMDEX EXPO COMM
Miami 98 MIAMI 98

EXAMPLE

Source

TeleForm requires an image of your existing form. How will TeleForm obtain this image?

Select an existing image

Scan a new image

Notes

1. Image should be scanned using the same scanner and in the same direction that will be used in production.
2. To create a multiple page form, all pages must be in the same image.
3. To create a dropout form, scan a non-dropout image now, band all your data fields, then rescan the dropout image and reclassify.

< Back Next > Finish Cancel Help

Checking Reference Marks on Existing Form Template

TeleForm automatically creates Reference Marks on the image of your Existing Form Templates. These reference marks act as the ID blocks and Reference Marks in Traditional and Versiform Templates as they identify incoming images as this Form Template.

These Reference Marks consist of red lines which are call Identification Lines and blue lines called Reference Blocks.

PARLIAMENT PROJECT SURVEY

DOCUMENT INFO

1. What is your affiliate goal in obtaining a document management system? Do there is real problem with the current operative that needs to be corrected?

2. USER USAGE

1. How many staff members can have in your department?

2. How many users will be using the system exclusively? (This determines the software cost and server size.)

3. Do you share documents with any other departments that are located elsewhere? 1 Yes 2 No

3. SECURITY AND COMPLIANCE (REQUIRED FOR SOX REPORT)

1. How many documents need to be either stored, administered, both the number of unique documents and the number of documents that will be added annually?

2. How many documents will you add to the system on a daily basis? (State number of records)

3. What is the largest size sheet that will be scanned? (minimum 11.7"x17")

4. What is the smallest size sheet that will be scanned? (minimum 2.1"x3.7")

5. Will scanned documents be scanned? 1 Yes 2 No

6. Are any of these documents not original scans, photocopies, copies, etc.? 1 Yes 2 No

7. If so, what percent of the total report, etc. contains?

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Good Identification Lines are drawn over solid lines and are not obstructed by data fields that are to be overlaid with Teleform data entry fields. Good Reference Blocks are drawn around images that remain constant on multiple returned forms. Such images include titles and graphics.

How to Disable Reference Blocks

Reference Blocks should not be drawn around data entry fields from which data would be extracted or barcodes that would change from form to form.

1. Double-click the Reference Block. A Note window will appear asking whether to disable the block.
2. Click Yes. The Reference Block will now be displayed as a dashed blue line and not a solid blue line.
3. The same procedure is followed to disable Identification Lines.

How to Enable Reference Blocks and Identification Lines

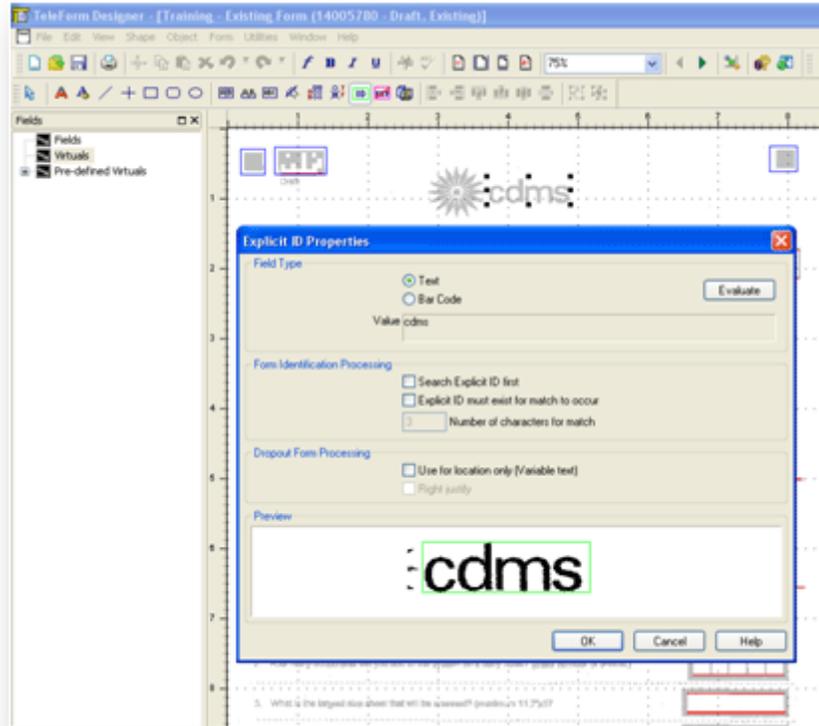
1. Follow the same procedure used to disable these Reference Marks.
2. To enable multiple Reference Blocks, under Form on the menu, select Re-classify. Designer will restore all Reference Blocks that were disabled.

What Are Explicit ID Fields

Explicit ID Fields are used in Existing Form Templates to a) identify an Existing form either because it is too similar in appearance to another Existing Form Template or the Reference Blocks are not sufficient to allow the Reader to identify it; and b) act as reference marks to identify other fields on dropout Existing Form Templates.

How To Set Up Explicit ID Fields

1. Click the Explicit ID icon on the menu bar or from under Shapes in the menu bar.
2. Drag the Explicit ID box over the text or barcode you want to use as your unique identifying mark for the Form Template.



3. In the Explicit ID Properties window, select whether text or barcode in the Field Type box. The Value box will display the text or barcode selected and evaluated as the Explicit ID.
4. In the Form Identification Processing box, select how and when the Reader is to evaluate the Explicit ID in processing the Form Template.
5. The Dropout Form Processing box is selected only when using dropout colours in Existing Form Templates. This type of Explicit ID field cannot identify the form, but is used to define the relative location of other objects on the Existing form. This option takes advantage of a name field, which is always printed in the same place but will never contain the same value from one form to another.
6. Click OK. The Explicit ID Field will be marked as a green box on the Form Template.



How To Overlay Data Entry Fields

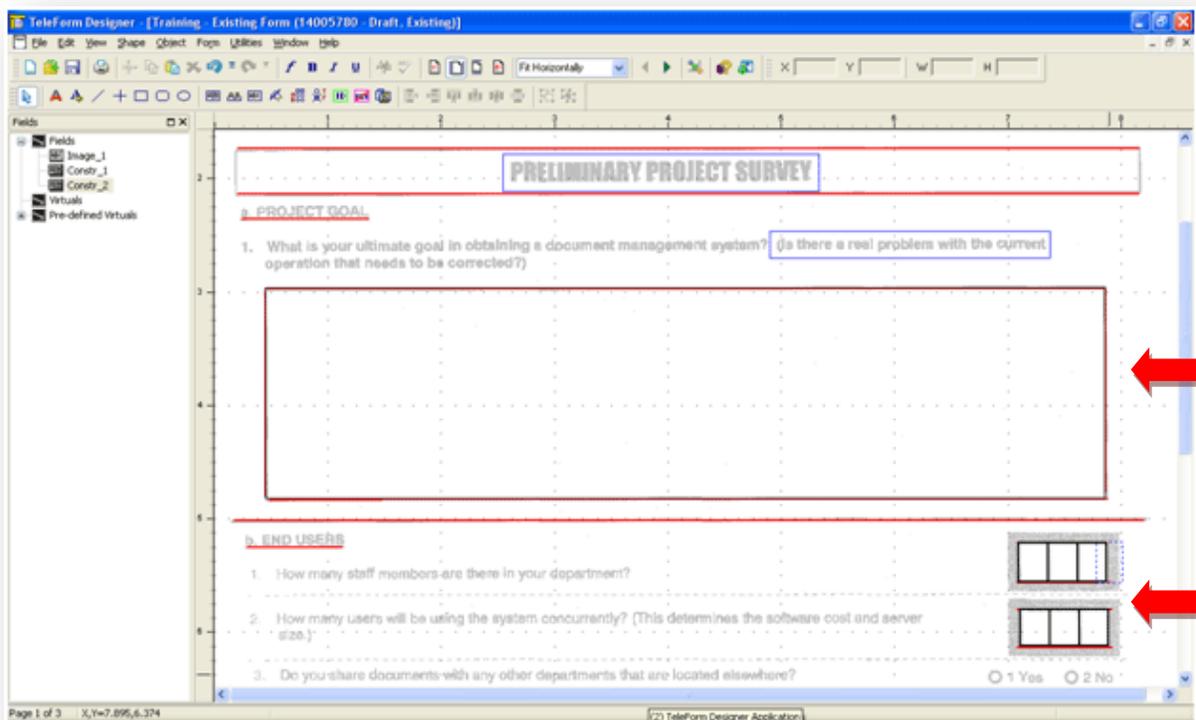
In order for the Reader to evaluate and export data from an Existing Form Template, Teleform data entry fields must be placed over the data entry fields on the Form Template. This process is called overlaying or banding. This automated process creates a Teleform data entry field based on the image of the existing data field on the Form Template.

Fields that resemble Teleform data entry fields are easy to replicate. These include constrained and choice fields. Image Zones are used to overlay fields that contain free form writing. More complex data entry fields that cannot be captured through the above data entry fields can be captured used Capture Zones.

Overlays can be easily sized and positioned to fit over the background image.

1. Identify the type of data entry field that best matches the field to be overlaid e.g. constrained, choice, image zone or capture zone.
2. Select the field type from the shortcut icons on the menu bar or under Shape on the menu bar.
3. Hold down the left mouse button and drag the data entry field cursor around the perimeter of the existing field.
4. Release the mouse button.

If TeleForm is able to correctly identify the type and shape of overlay field, it will automatically create a corresponding data entry field on top of the background image. If not, you will need to manually edit the overlay field. In the example below, an Image Zone and Constrained Fields were used to overlay the corresponding data entry fields.



How To Link Multiple Pages of Existing Form Templates

Image Zones are used to link pages in Existing Form Templates.

1. Go to page 1 of the Form Template.
2. Create an Image Zone and place it in an appropriate location on the form, either the top or bottom corners.
3. On the **Object** menu, click **Page Link**. This command will be unavailable if the object you selected is not a data entry field or if you are on any page other than page 1.
4. A check mark appears next to the **Page Link** menu item to indicate that this field has been selected as the Page Link field.
5. The selected data entry field will be repeated on all subsequent pages.
6. Do **NOT** create more than one Page Link field per Form Template.
7. Open the Form menu and click 'Script'. This causes the form script editor to display on the screen.
8. Locate the Sub Form_Evaluate entry point:

```
Sub Form_Evaluate
```

```
End Sub
```

9. Add the following lines inside the Sub Form_Evaluate entry point so that it looks like the following. (This script assumes a 2 **page** form. When entering your script, replace the number "2" with the actual number of **pages** on your form).

```
Sub Form_Evaluate
```

```
Dim PagesPerForm As Integer
```

```
PagesPerForm=2
```

```
PLINK.Text=Str$(Val(BatchPgNo.Text)\PagesPerForm)
```

```
End Sub
```

10. Compile the script (File menu - Compile).
11. If you entered the script correctly and added the **page link** field called 'PLINK' to your form, you should see the string 'Compiled OK' displayed in the status bar at the bottom of the script editor window.
12. Save the compiled script (File menu - Save).
13. Exit the script editor (File menu - Close).