

Creating and editing forms



You can bring paper or electronic forms (distributed mainly as PDF in an office environment) into OmniPage Professional 16, recognize them and edit their content, layout or both - in True Page view. Draw form zones over the relevant areas of your image before recognition, or choose Form as recognition layout, then use the two toolbars: Form Drawing and Form Arrangement to make modifications and produce a fillable form and save it in the following formats: PDF, RTF, or XSN (Microsoft Office InfoPath 2003 format). Static forms can be saved to HTML. OmniPage Professional 16 uses the Logical Form Recognition™ technology to process forms.

Please note that OmniPage supports form creation and editing, however the tools available here are not designed to fill in forms.

The Form Drawing Toolbar

This is a dockable toolbar, displayed in the Text Editor that allows you to create a range of form elements using the following tools:



Selection: Click this tool to be able to select, move, or resize elements in your form.



Text: Use the text tool to add fixed text descriptions on your form such as titles, labels and headers.



Line: The Line tool is mainly used in layout design: click it and draw lines to separate distinct sections in your form.



Rectangle: Click this tool to create rectangles in your form for design purposes.



Graphic: Use this tool to select areas of your form that are to be treated as graphics.



Fill text: Click this tool to create fillable text fields. These are fields where you want people to enter text.



Comb: Use this tool to create a text field consisting of boxes. This is typically used for information such as ZIP codes.



Checkbox: Click this tool and draw Checkboxes - typically for Yes/No questions and marking one or more choices.



Circle text: Its function is similar to the Checkbox element (above): the Circle text tool creates elements that get encircled when selected.



Table: This tool creates tables in your form.

You can also create form elements by right clicking an existing form element in your recognized form, and choose the Insert Form Object menu item.

The Form Arrangement Toolbar

The tools on this toolbar can be used to line up form elements or to set which one is on top of the others when they overlap. This latter function is useful for example if you want to create a background graphic design for your form.



To set the order of overlapping elements, use the “Bring to Front” and “Send to Back” buttons.

To align the right/left, top/bottom edges or the centers of the selected form elements



horizontally - use the horizontal alignment tools

vertically - use the vertical arrangement tools.

The commands of the Form Arrangement toolbar are also accessible from the shortcut menu of any form element.

Editing Form object properties

To edit a form object directly select it then right-click the given element to display its shortcut menu. You can edit the appearance or the properties of any form element here. Use the following commands:

Form Object Appearance - use the tabs Borders, Shading and Shadow to design the look of your form elements in a similar way as you would do in a text-editing application.

Form Object Properties - this command gives you access to the element properties such as size, position, name. Note that properties dynamically vary depending on what type of element you select.

Extracting Form Data



Form data extraction is a new workflow step. Data is extracted from elements

such as fillable fields, check boxes, and option buttons.

To create a workflow that contains form data extraction:

- Define the input and its settings. Input types include: image PDF, PDF form, image files and forms scanned from paper.
- Choose Extract Form Data in place of recognition, and specify its settings. Set an active PDF form as template. It can be single or multi-page, filled or unfilled. The program determines the location and type of the form fields based on this form template.
- Finish the workflow with a saving step.

OmniPage will extract data from the form, using the specified template. Export is to a comma separated value text file (.csv) ready to be loaded into a spreadsheet.

Once you select Form Data Extraction in a workflow, only saving steps will follow.