

## README - FormIDEA 4.0

### Standard Edition (Evaluation)

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#### About FormIDEA for Excel

FormIDEA for Excel is an intelligent *Form Image Data Entry Assistant* for Excel, which helps you to capture data from scanned or faxed forms, process and analyze them using Excel. FormIDEA for Excel is also a *Form Image Document Enabled Add-in* for Excel, which provides you with image-enabled Excel workbooks for storing, retrieving and viewing form image documents using Excel.

FormIDEA for Excel consists of two modules: *FormDefine* and *Excel Add-in*. The *FormDefine* module is used to train your computer on the form type you want to process and create a *reference form* for the form type. The *Excel Add-in* module will use the reference form to capture data from the same type of forms into Excel.

***This evaluation version does not include the FormDefine module. Instead, it provides a number of pre-scanned sample form images and pre-defined reference forms for you to examine the functionality of FormIDEA.***

#### What's New in FormIDEA 4.0?

Besides all capabilities supported in the previous version (such as Optical Mark Recognition, Barcode Recognition and Linear Mark Recognition, etc.), *FormIDEA 4.0* includes the following new features and enhancements:

1. Support for the latest versions of Microsoft Office 2007 and Windows Vista.
2. Significant capability enhancement with Excel 2007 – The maximum capacity of data fields to be captured on a form is increased from 256 to 16K - more than enough for processing many complex and multi-page forms.

*If you have Microsoft Office 2003 or 2007 installed on your computer, you can try **FormIDEA 4.0 PRO** for additional new features added in **FormIDEA 4.0 Professional Edition**:*

1. New capability of performing OCR (Optical Character Recognition) for capturing alphanumerical data on scanned forms. Text fields in multiple fonts and multiple languages can be automatically recognized, including text in East Asian languages.
2. Support for multiple-page forms processing – efficient page batch scanning and indexing with automatic multiple-page merge feature.

For more information about *FormIDEA 4.0* features, visit the TechVision *FormIDEA* web site at <http://www.tkvision.com/product/idea.htm>

## FormIDEA 4.0 System Requirements

The following Microsoft products must be installed in your computer system to run FormIDEA 4.0:

- **FormIDEA 4.0 Standard Edition:**
  1. Windows 2000 with SP3 / Windows XP with SP2 / Windows Vista.
  2. Office 2000 / 2002 / 2003 / 2007.
- **FormIDEA 4.0 Professional Edition:**
  1. Windows XP with SP2 / Windows Vista.
  2. Office 2003 / 2007 with MODI (Microsoft Office Document Imaging).

Also, you will need a scanner to scan paper forms into black & white images in *TIFF/BMP/PCX* format. Most document scanners with ADF (automatic document feeder) that support black & white (bi-tonal) document scanning should work well.

## Installing FormIDEA 4.0

*If you have a previous version of FormIDEA for Excel installed in your computer system, please follow the procedure described in **Uninstalling FormIDEA** to remove the old version before install a new FormIDEA version.*

To install FormIDEA 4.0:

1. Quit *Excel* if it is currently running on your computer.
2. Insert the *FormIDEA 4.0* software CD to the CD ROM drive, and go to the root directory of the drive.
3. Run (double-click) the *Setup.exe* program and follow the on-screen instructions.

The installation program will install *FormIDEA Excel Add-in* module in your computer and register the *Excel Add-in* module in Excel automatically.

## Uninstalling FormIDEA 4.0

If you want to uninstall FormIDEA 4.0, you should follow the steps below to unregister the *FormIDEA Excel Add-in* module first, then remove the FormIDEA program from your computer system:

- Unregister (unload) the FormIDEA Excel Add-in module from Excel:

Excel 2003:

- Select the *Add-ins...* menu item in the Excel *Tools* menu.
- Uncheck the box *FormIDEA 4.0 for Excel* and click *OK*.

Excel 2007:

- Click the *Office* button (at the top-left corner of Excel).
- Click *Excel Options* on the bottom.
- Select *Add-Ins* menu on the left.
- Select *Manage: Excel Add-Ins* (at the bottom) and click *Go...*
- Uncheck the box *FormIDEA 4.0 for Excel* and click *OK*.

- Go to the Windows *Start/Settings/Control Panel* and click the *Add/Remove Programs*. In the *Install/Uninstall* folder, select the *FormIDEA 4.0* then click *Remove*.

### Previewing FormIDEA 4.0 with Sample Forms

To help you to get started quickly, there are several sample forms included in the *FormIDEA 4.0* software package. Each sample form type has a pre-defined reference form created by the *FormDefine* module. Using these pre-defined reference and sample forms, you can start the *FormIDEA Excel Add-in* module directly to preview forms processing in Excel for different applications.

The *Quick Tour* in the *Help* menu will guide you to start *FormIDEA Excel Add-in* with pre-installed samples:

- Start Excel; select the *Image Data Entry Assistant* menu command in the *Excel Tools* menu (Excel 2003), or in the *Add-Ins* menu (Excel 2007). This will activate the *FormIDEA* add-in custom toolbar.
- Click the *Quick Tour* in the *Help* menu on the *FormIDEA Add-in* toolbar, then follow the instruction displayed on the screen. You can repeat the *Quick Tour* for each sample form type to see how it works.

The following is a list of sample forms with pre-defined reference files and scanned forms for preview:

Name	Recognition Demonstrated
BarcodeTest	Barcode
CampusSurvey	OMR
ElectionBallot	OMR
EventEvaluation	OMR, LMR
Exam050	OMR
HealthSurvey (P1,P2)	OCR (PRO), OMR
InsuranceClaim (PRO)	OCR, OMR
Invoice (PRO)	OCR
MedicalIntake	OCR (PRO), OMR
PatientCare	Barcode, OMR, LMR
TestAnswerSheet150	OMR
WineTasting	Barcode, OMR, LMR

To start processing your own forms, you need to use the *FormDefine* module to create a reference form first, then use the *FormIDEA Excel Add-in* module to process your forms.

For complete description of the functionality and processing procedures, including how to run *FormIDEA* automatically with Visual Basic programming, read the online Help manual.

### Documentation

FormIDEA 4.0 includes Help manuals covering all aspects of each *FormIDEA* module and its use. These Help manuals are accessible from your installed *FormIDEA/Help* directory.

Help manual topics are also accessible from the online Help menu of the *FormIDEA Excel Add-in* or *FormDefine* module.

### Online Support

Before seeking technical support, try to find the answers you need in *FormIDEA* Help manuals, as described in the above Documentation section. This could save you time and money.

TechVision provides sixty days of free technical support, starting from your purchase date of the software. To get technical support, you can visit the following TechVision web site, or send email to [support@tkvision.com](mailto:support@tkvision.com).

*Online Registration:*  
[www.tkvision.com/register/register.htm](http://www.tkvision.com/register/register.htm)

*Online Support:*  
[www.tkvision.com/faq/reqform.htm](http://www.tkvision.com/faq/reqform.htm)

*Frequently Asked Questions:*  
[www.tkvision.com/faq/faq.htm](http://www.tkvision.com/faq/faq.htm)

*TechVision Home Page:*  
[www.tkvision.com](http://www.tkvision.com)

### ***Contacting TechVision***

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