

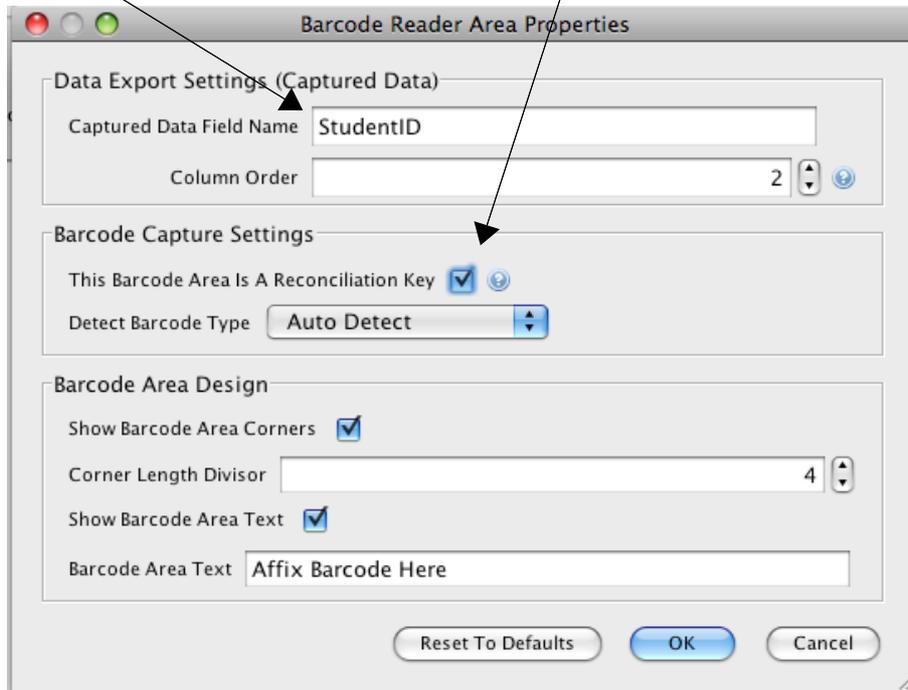
## STEP BY STEP INSTRUCTIONS FOR USING TEMPLATES (WITH A BARCODE AREA ADDED).

(See our online help guide for full instructions on any of the steps)

1. Save the segment and form files on your computer.
2. Open the segment file.frs in the segment editor. This can be done by double clicking on the file straight from your computer and FormReturn will open automatically.
3. Select the barcode area and adjust the size to suit your barcode labels. This Barcode area is used to affix your own barcode labels, which will reconcile the captured response data with records in your data table. Click the Set Properties button in the Barcode Reader Area Properties dialog on the left.

Change Captured Data Fieldname to reflect a data table fieldname Eg: StudentID

Check the Barcode Reconciliation box



4. Type the question text in the text areas for each question by double clicking on the text area. To change the font size, select all the text areas at once and change the font size in the panel at left.
5. If you need to change the number of checkboxes in the mark area or the size and style of the checkboxes, double click on one of the mark areas to open the Mark Area Properties dialog and change the style to what you want and save the setting as a new pre-set style. Then select all the mark areas at once and choose that Preset Style from the Mark Areas panel at the left of the page and Apply Style.
6. When you have finished editing the segment, SAVE it and add it to the form template file .frf. (The segment that has already been added to the form file will have to be deleted first).
7. Open the form template file, click on the original segment to select it and press the delete key. SAVE the template and then add a new empty segment area by clicking on the segment tool in the toolbar and then drag a small area on the form page. Click load segment in the panel on the left, choose the segment and click OK. The segment will load onto the page.
8. In the space at the top of the form, where it says Template Variable Replacement, type in your data table fieldnames that you want to be printed on the form. The fieldnames you type must correspond exactly to the ones in your data table. Type them like this, Eg: <<firstname>> <<lastname>>, surrounded by the less than and greater than symbols. Use the rest of the space at the top of the form to add any other text you want printed on the form.
9. Click on the Recognition Preview tab and make sure the barcodes, the segment and the fragments (mark areas) are all detected.
10. Please Contact us through the FormReturn website if you have any problems, by sending us an email with your segment and form files attached.
11. Next do a test preview by printing a form, (there is a print button in Recognition preview) fill in some of the bubbles in the mark areas and then scan it and save the image to your computer. Click browse images and open the form image in Test Preview and click all the Preview Check boxes. Make sure all your handmarks are detected properly. (you can double click to zoom in on each mark area)This is a test for your scanner's settings and whether it produces a good form image. A quality form image is vital for accurate OMR detection.
12. The next step is Form Publication and printing the forms to be distributed. Add a data table to Source data (FormReturn's database). This data table will hold the records of your respondent's who will be completing the

forms. There are 4 steps in the Publication process – \*Choose a data table, \*type a name for your publication, \*Click on Verify form structure and OK in the dialog that opens... (this verifies a form ID barcode is on every page that will be published), and \*choose the Key Field Reconciles-Append or New Record publication type from the drop down menu. Click the publish and PDF button and the publication will be saved to a PDF file on your computer. (take note of where you save it) Open the PDF file and print the forms. There will be one form published from which you can print as many copies as needed..

13. When the forms are returned, scan them and save to your computer.
14. Open the Processing Queue and click Upload Image to upload your form images into FormReturn's form processor. (*Depending on how many forms you have, this process could be almost instant*)
15. Click on Captured Data and select the publication name to see the captured response data from each form. Click Forms, select a form and then click Form pages.

ID	Publication ID	Form ID	Page Number	Page Score	Processed Time
130	28	99	1	0.0	September 18, 2009
131	28	99	2	0.0	September 18, 2009
132	28	99	3	0.0	September 18, 2009
133	28	99	4	0.0	September 18, 2009

Field Name	Captured Value	Mark
fieldname1	B	0.0
fieldname2	A	0.0
fieldname3	A	0.0
fieldname4	B	0.0
fieldname5	B	0.0
fieldname6	C	0.0
fieldname7	B	0.0
fieldname8	C	0.0

16. To Export the captured data from the publication, click the publications tab again, select the publication name and click Export Data in the panel on the left. Click OK for the data to be saved to a CSV file. Open the CSV file from where it was saved and Click OK again. A spreadsheet will open from whatever application you have installed on your computer.