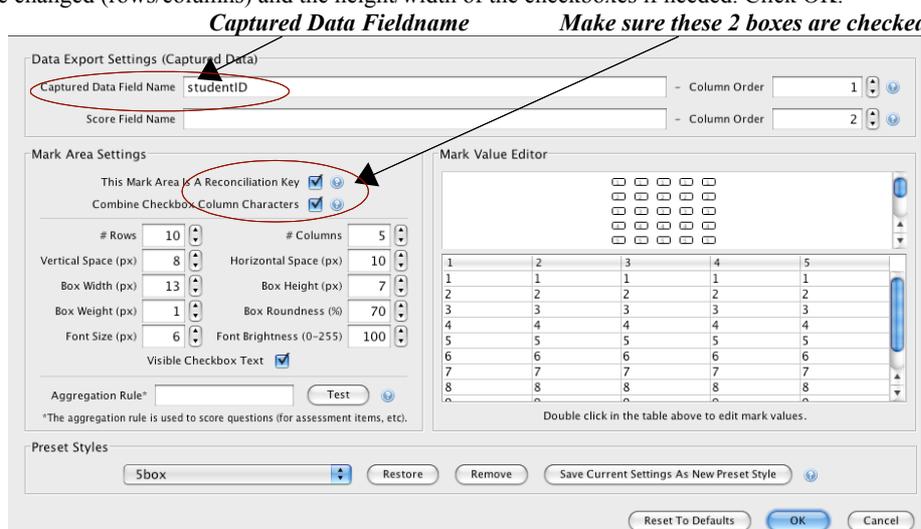


**STEP BY STEP INSTRUCTIONS FOR CUSTOMIZING AND USING TEMPLATES
WITH AN OMR ID GRID ADDED FOR IDENTIFICATION OF FORMS.
(See our online help guide for full instructions on any of the steps)**

An OMR ID Grid is used to capture the respondent's ID numbers, using Optical Mark Recognition when the returned forms are being processed. Using the ID numbers marked into the grids of the returned forms, the captured response data is reconciled with the records in the data table. (See Add Source Data in the help guide to add a data table with your respondent's records. The data table would have a fieldname added Eg: StudentID with the ID numbers added as records)

1. Save the downloaded segment and form files on your computer.
2. Open the segment file.frs in FormReturn and it will open in the segment editor. This can also be done by double clicking on the file and FormReturn will open automatically.
3. Double click on the ID grid and the Set Properties Dialog will open. Change the Captured Data Fieldname to the same name as the fieldname, containing the ID number records which are in your data table. The number of checkboxes in the grid can be changed (rows/columns) and the height/width of the checkboxes if needed. Click OK.



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 areas or the height/width size 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 and click OK. 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, click SAVE in the edit menu, and re-add your customized segment to the form template (*The segment that has already been added to the form file will have to be deleted first see step 7*).
7. Open the form template file.frf, click on the segment part of the form to select it and press the delete key. SAVE the template (*this deletes any of the old segment information*) 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. Click SAVE in the edit menu.
8. Click on the Recognition Preview tab and make sure the barcodes, the segment and the fragments (mark areas) including the grid, are all detected. The ID grid is detected with a red border, as all other fragments are, and it should read String across the top, this means the ID number detected in the grid will read as a combined character string, not separate numbers.
Please Contact us through the FormReturn website if you have any problems, by sending us an email with your segment and form files attached.
9. Next do a test preview by printing a form, click the print button when you open the form in Recognition preview. Fill in some of the bubbles in the mark areas using a black or blue pen or dark pencil, and then scan the form and save the image to your computer. Click browse images and open the form image in Test Preview (*this process does not capture any data*) 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 ability to produce a good form image. A quality form image is vital for accurate OMR detection.
10. The next step is Form Publication and printing the forms to be distributed. If you haven't already done so, add a data table to Source data (FormReturn's database). This data table will hold the ID records of your respondent's who will be completing the forms. There are 4 steps in the Publication process – 1. Choose a data table, 2. type a name for your publication, 3. 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), 4. Select from the publication type drop down menu, Key Field Reconciles-Append or New Record (this option will append the captured response data for each form, to a record in the data table using the ID number collected from the grid, or if there is no number marked into the grid, it will create an automatically generated, new record). Next, click the publish and PDF button and the publication will be saved as 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.

11. When the forms are filled in and returned, scan them and save to your computer.
12. Click the Processing Queue icon, and click Upload Image and choose the scanned image files to upload into FormReturn's form processor. *(Depending on how many forms you have, the processing of forms could be almost instant)*
13. Click the Captured Data icon, and select the publication name to see the response data captured from each form. Click the Forms tab, select a form from the list and then click Form pages tab. View full-size image to enlarge the form image.

Scanned image of the selected processed form.

The screenshot shows the 'Captured Data' application window. At the top, there are tabs for 'Publications', 'Forms', and 'Form Pages'. Below the tabs is a table with the following data:

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

To the right of the table is an 'Image Preview' section showing a scanned form page. Below the image preview are 'Page Score: 0.0' and 'Form Score: 0.0'. At the bottom right, there is a 'Captured Data' table with the following data:

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

Captured Data Field Name is the name that was given to each question in the Mark Area Properties dialog box.

If any form images are missing, go back to Processing Queue and look in the Unrecognized Images folder. Re-scan the forms and upload again.

14. To Export the captured data from the publication to a spreadsheet, click the publications tab again, select the publication name and click Export Data in the panel on the left. Click OK in the dialog box that opens, and the captured response data will be saved to a CSV file. Open the CSV file from where you saved it and Click OK again. A spreadsheet will open using which ever application (MicrosoftWorks/Open Office) you have installed on your computer.