

User's Guide

Version 15.7



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| Title | IQforms User's Guide |
|----------|----------------------|
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Introduction to IQforms

IQforms enables users to process forms, barcode coversheets and checks and export various data from those documents into ImageQuest. IQforms licensing dictates which processing options are available to the customer.

The IQ forms solution includes the IQ forms Designer for form template design and management, and the IQ forms Service which handles forms processing and manages form configurations.

Licensing Components

IQ forms licensing is broken down into four separate modules, each of which can operate independently:

- Form Templates (created with the Designer)
- Barcode Coverpages
- Checks
- KeywordForms

These modules are described in this user guide and licensing is managed in IQadministrator (see the IQadministrator Guide). Please contact Informa Sales with any questions regarding the modules.

System Requirements

The IQ forms Designer and IQ forms Service can both be installed on the same server or workstation, but it is recommended that the IQ forms Designer be installed on a client workstation and the IQ forms Service be installed on the ImageQuest server.

IQforms Designer

- Microsoft .Net Framework version 4.8
- Windows 10

IQforms Service

- Microsoft .Net Framework version 4.8
- Windows Server 2012 R2, Windows Server 2016, Windows Server 2019, Windows Server 2022

Additional requirements:

- ImageQuest 15.7 Server
- At least one Document Type and attribute defined in ImageQuest

Installation

IQforms can be installed on any PC on the network. There are two installation files that need to be run, Designer.msi and Service.msi. Designer is also known as "FormAssist" and it allows users to design a form template for use with IQforms. The IQforms Service is a Windows service that monitors specific folders for form images to be processed and evaluates all pages to extract the form data. You can install the Designer on one machine and the service on another if desired.

Installing IQforms Designer

To install the IQ forms Designer, double click the "Designer.msi" file.



The License Agreement will appear. Select the checkbox for "I accept the terms of the License Agreement" and click "Install"

| ₩. | IQforms Designer | Setup | | × |
|-------|---|--|--|----|
| | Please read the IQ License Agreement | forms Designer L | 8 | |
| | Common Public Lice | ense Version 1.0 | C. | ^ |
| | THE ACCOMPANYIN UNDER THE TERMS LICENSE ("AGREEM REPRODUCTION OF PROGRAM CONSTIL ACCEPTANCE OF T | IG PROGRAM IS OF THIS COMM ENT"). ANY USE DISTRIBUTION TUTES RECIPIEN HIS AGREEMENT | PROVIDED ION PUBLIC OF THE IT'S | |
| | 1. DEFINITIONS | | | |
| í | "Contribution" mean | ns: | | ~ |
| Image | Quest I accept the terms in | the License Agree | ment | |
| | Print Back | Install | Cano | el |

The IQ forms Designer will begin to install.

| 뤙 | | IQforms Designe | r | Setup | - 🗆 X |
|-----|----------------------|---------------------------|--------------|-------|--------|
| In | stalling IQform: | s Designer | | | í |
| Ple | ase wait while the S | Setup Wizard installs IQf | orms Designe | r | |
| Sta | tus: Copying | new files | | | |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | [| Back | Next | Cancel |

Click Finish when the setup is complete.

| 륑 IQf | orms Designer | Setup | - 🗆 X |
|------------|--|---------------------|---------|
| | Completed the IQforms Designer Setup Wizard | | |
| | Click the Finish button | to exit the Setup W | Vizard. |
| | | | |
| | | | |
| Q | | | |
| ImageQuest | t | | |
| | Bad | Finish | Cancel |

Installing the IQforms Service

To install the IQ forms Service, double click the "Service.msi" file.

| G | | | | |
|---------------------------|--------------------------------|-------------------|---------------------------|-----------|
| File Edit View Tools | Help | | | |
| Organize 🔻 🛛 Include in I | ibrary 🔻 Share with 🖛 Burn New | / folder | | |
| 🔆 Favorites | Name | Date modified | Туре | Size |
| 🧮 Desktop | 🔂 Designer.msi | 5/7/2013 10:28 AM | Windows Installer Package | 64,014 KB |
| 🕕 Downloads | 🔂 Service.msi 🔫 | 5/7/2013 10:29 AM | Windows Installer Package | 56,632 KB |
| 📃 Recent Places | | | | |
| 퉬 SkyDrive | | | | |
| 🧮 Desktop | | | | |

The License Agreement will appear. Select the checkbox for "I accept the terms of the License Agreement" and click "Install"

| N | IQforms Service | Setup | - 🗆 X | |
|-------------------------------|--|---|--------|--|
| | Please read the License Agreen | e IQforms Service nent | | |
| Common Public License Version | | License Version 1. | 0 ^ | |
| | THE ACCOMPA UNDER THE TE LICENSE ("AGR REPRODUCTIO PROGRAM CON ACCEPTANCE O | THE ACCOMPANYING PROGRAM IS PROVIDED UNDER THE TERMS OF THIS COMMON PUBLIC LICENSE ("AGREEMENT"). ANY USE, REPRODUCTION OR DISTRIBUTION OF THE PROGRAM CONSTITUTES RECIPIENT'S ACCEPTANCE OF THIS AGREEMENT. | | |
| 個 | 1. DEFINITIONS | s means: | ~ | |
| Image | Quest I accept the ter | rms in the License Agree | ement | |
| Print Back Instal Cancel | | | Cancel | |

The IQ forms Service will begin to install.

| 闄 | IQforms Servi | ce | Setup | - • × |
|---|--|----------------|-------|--------|
| 1 | installing IQforms Service | | | í |
| ç | fease wait while the Setup Wizard installs I | Qforms Service | | |
| 5 | tatus: Copying new files | | | |
| Ľ | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | Back | Next | Cancel |

Click Finish when it is complete



NOTE: If the IQforms Service is not installed on the ImageQuest Server, you will need to change the IQServer value in the "Informa.ImageQuest.IQforms.Service.exe.config" from the setting of "localhost" to the actual ImageQuest Server name. This file is located on the computer where the Service was installed. The default location *is C:\Program Files (or x86)\Informa Software\ImageQuest\IQforms\Service.*

Once both installs have completed, there will be an entry in the All Programs Menu for IQ forms under the Informa Software folder listing the IQ forms Console and IQ forms Designer.

| 퉬 Informa Software | |
|--------------------|--|
| 퉬 ImageQuest | |
| 🛠 IQadministrator | |
| 🚺 IQdesktop | |
| IQforms | |
| 📔 IQforms Console | |
| IQforms Designer | |

The installation of both programs creates 3 folders (Console, Designer and Service) in the Informa Software directory on the C: drive:

In the example below, the location is C:\Program Files (or Program Files (x86)\Informa Software\ImageQuest\IQforms.



The IQ forms service is installed under the Windows Services section and defaults to the Local System account.

| Name 🔺 | Description | Status | Star |
|------------------------------------|---|---------|------|
| 🔍 IQ Ocr and Full Text Service | ImageQuest Ocr and Full Text Service pro | Started | Auto |
| 🔍 IQApplication Service Host | Provides client connections to the ImageQ | Started | Auto |
| 🎑 IQfolder Image Importing Service | ImageQuest Folder Service allows devices | Started | Auto |
| 🔍 IQforms Service | IQforms Service for processing forms. | Started | Auto |

Form Set

A Form Set will need to be created for each form or group of forms that will be used with IQforms. The purpose of a Form Set is to define a collection or "set" of forms and the common properties for those forms for use in processing images against the form set. The Form Set is the top of the hierarchy and contains one or more forms.

Create a Form Set

To begin designing a Form Set, open IQforms Designer. The FormAssist dialog will appear. Select "Create a new form template library" and click "OK".

| FormAssist | —X — |
|---|-------------|
| Open most recently used form template libra | ıry |
| Oreate a new form template library | _ |
| Open an existing form template library | |
| ОК | Cancel |

IQforms Designer is started and a NewFormSet.frs is created. "frs" stands for "Form Recognition Set".

| IQforms Designer - NewFormSet.frs | | | | |
|--|--|--|--|--|
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| | | | | |
| Form Set | | | | |
| - NewForm Set | | | | |
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| | | | | |
| Setting: | | | | |
| General ScanFix Xpress Identify | | | | |
| Form Set NewFormSet | | | | |
| Filename | | | | |
| Cabinet | | | | |
| | | | | |
| ranue queue. | | | | |
| Folder Path: | | | | |
| Field Minimum Confidence: 0 + | | | | |
| I Enable Nonforms | | | | |
| Disable Key Field lookup | | | | |
| Overwrite recognized field values with lookup values | | | | |
| I Fail form when lookup returns zero results | | | | |
| Fail form when lookup returns more than one result | | | | |
| Number of Forms: 0 | | | | |
| | | | | |
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Rename a Form Set

To start, change the name of the Form Set to something meaningful or related to the form or group of forms that will be part of the Form Set.

There are two ways to change the Form Set name. In the examples below, the Form Set is renamed to "Accounts Receivable".

Option 1 - Select "NewFormSet" in the Form Set tree view, type in the new name and press Enter.



Option 2 – In the Settings window under the General tab, highlight "NewFormSet", type in the new name and press Enter.

| Settings: General Scanfix Xoress Identify | |
|--|--|
| Form Set NewFormSet | Settings: General ScanFix Xpress Identify Form Set Accounts Receivable Filename |

When the name is changed in the Form Set tree view or Settings window, it will automatically update in the associated field in the other section.

| Form Set | eceivable |
|-------------------------------------|-------------------------------|
| Settings: | |
| General ScanFix Form Set Accourt | foress Identify ts Receivable |
| Filename | |

Settings - General Properties

The General tab in the Settings window contains multiple settings that must be configured for the Form Set. These options are highlighted red in the screenshot below. See the next page for descriptions and examples of each setting.

| Settings: | |
|--|---|
| General ScanFix Xpress Identify | |
| Form Set Accounts Receivable | |
| Filename | |
| Cabinet: | • |
| Failure Queue: | |
| Folder Path: | |
| Field Minimum Confidence | |
| Enable Nonforms | 1 |
| 🗖 Disable Key Field lookup | - |
| Overwrite recognized field values with lookup values | |
| Fail form when lookup returns zero results | |
| Fail form when lookup returns more than one result | |
| Number of Forms: 0 | e |
| | |
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Cabinet - Indicates the name of the ImageQuest cabinet for the Form Set. This is where the form images will be archived by IQforms.

NOTE: If you have multiple cabinets, select the appropriate cabinet from the dropdown list.

| Cabinet: | ImageQuest | • |
|----------|------------|---|
| | | |

Failure Queue - The "Failure Queue" is the Indexing Queue of an ImageQuest User or Role in IQdesktop that will contain any scans/forms that fail to process correctly. These failed scans/forms can be reviewed from the Indexing Queue and then corrected and manually indexed.



Folder Path - Where the scans for this particular Form Set will be sent needs to be mapped in the "Folder Path" field. Each FRS must have its own, unique Folder Path. NOTE: If this Folder Path is not local to the IQforms Service, the Service account must be changed to an account with proper rights to read/copy and delete from that location.

| Folder Path: | C:\AR Forms | |
|--------------|---------------------------------------|--|
| | · · · · · · · · · · · · · · · · · · · | |

Field Minimum Confidence - This sets a minimum confidence for a successful match. If the best match for the field has a confidence lower than this value, this field will never consider it a match and no data will be read from the field. The default value is "0".

Enable Nonforms – Selecting this checkbox will group documents that are scanned together and not defined as a form into one multi-page document. This can be useful when scanning forms that have attachments.

Disable Key Field lookup – Check this option if there is a Key Field lookup configured in ImageQuest and you want IQforms to ignore that lookup. By default, IQforms can work in conjunction with an ODBC lookup in ImageQuest (see the ImageQuest Administrator's Guide for more information) to lookup data from an external source and populate additional attributes or fields as necessary.

| _ | | | | | |
|---|--------|--------|--------|--------|---|
| | Diabh | la Kaw | Eigld. | lo oku | - |
| | DISadi | ie ney | FIEIU | 100ku | p |

Disable Key Field lookup has three associated options. All three options can be selected, or each option can be selected individually.

Overwrite recognized field values with lookup values – IQforms reads the field data but will overwrite the field(s) with the lookup data regardless of what is read off of the form.

Fail form when lookup returns zero results – This option tells IQ forms to send the scanned document to the Failure Queue for manual indexing if there are no results returned from the lookup.

Fail form when lookup returns more than one result - This option tells IQ forms to send the scanned document to the Failure Queue for manual indexing if there are multiple results returned from the lookup.



Notice that by checking the "Disable Key Field lookup" option, the associated checkboxes are grayed out.

| • | Disable Key Field lookup |
|---|--|
| Г | Overwrite recognized field values with lookup values |
| Г | Fail form when lookup returns zero results |
| Г | Fail form when lookup returns more than one result |

The example below shows the general settings for the Accounts Receivable Form Set.

| Settings: | |
|---|--|
| General Scan Form Set Acco Filename C:\Pr | Fix Xpress Identify unts Receivable ogram Files (x86)\Informa Software\ImageQuest\IQforr |
| Cabinet: | ImageQuest 🔹 |
| Failure Queue | Administrator (User) |
| Folder Path: | C:\AR Forms |
| Field Minimum | Confidence: 0 - |
| Enable Nor | nforms |
| Disable Key | y Field lookup |
| C Overwrite n | ecognized field values with lookup values |
| Fail form w | hen lookup returns zero results |
| Fail form w | hen lookup returns more than one result |

Settings - ScanFix Xpress Properties

These properties allow you to set the image operations for all forms that are processed against the selected Form Set.

The screenshot below displays the default settings.

| Settings: | |
|--|--|
| General ScanFix Xpress Ident Adjust Brightness Contrast Pro Adjustment Automatic Contrast Limit Dark 127 ÷ Contrast Limit Mid 127 ÷ Contrast Limit Light 127 ÷ Min. Percentile 0 ÷ | fy perties Quality 80 * Target Brightness 225 * Target Contrast 127 * Target Variance 25 * Max. Percentile 100 * |
| Adjust Brightness Contrast Auto Binarize Auto Image Detergent Binarize Blob Removal Color Drop Comb Removal Deskew Despeckle Dilate Dot Shading Removal Erode Inverse Text Correction Line Removal Smoothing | |

For more information about the Form Set ScanFix Xpress properties, please select Help > Contents in IQforms Designer.

Settings - Identify Properties

Setting the Identify properties appropriately for a Form Set may improve the accuracy and speed of forms processing operations.

| The screenshot below o | displays tl | he default settings. |
|------------------------|-------------|----------------------|
|------------------------|-------------|----------------------|

| Settings: |
|--------------------------------------|
| |
| General ScanFix Xpress Identify |
| Identification Quality 100 💼 |
| Idenitfication Certainty 100 💼 |
| Minimum Identification Confidence 60 |
| Identify Rotated 90 🔽 |
| Identify Rotated 180 🔽 |
| Identify Rotated 270 🔽 |
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For more information about the Form Set Identify properties, please select Help > Contents in IQforms Designer.

Form Design

Once the Form Set is created, the next step is to add, design and configure a new form template.

Adding a Form to a Form Set

A form is created from a tiff image that is imported into IQforms Designer. The recommended specifications for these images is Black & White, 300DPI using CCIT Fax 4 compression. The image should be free of any data that can change from form to form. In other words, remove all data on the form except for items that are constant like headers, addresses, field names, etc. See the screenshot below for an example.

| REMIT TO: INVOICE NUMBER: Informa Software INVOICE DATE: 123 Baker Street Orlando, FL 32810 BILL TO: SHIP TO: Item # Description Quantity Unit Price Total | MT TO: INVOICE NUMBER: INVOICE DATE: Baker Street INVOICE DATE: BILL TO: SHIP TO: n # Description Quantity Unit Price Total | | INVOICE | s of tware |
|--|--|---|----------|------------------------|
| BILL TO: SHIP TO: | BILL TO: SHIP TO: | EMIT TO: nforma Software 23 Baker Street Irlando, FL 32810 | INVOK | CE NUMBER: CE DATE: |
| Item # Description Quantity Unit Price Total | n # Description Quantity Unit Price Total | BILL TO: | SHIP TO: | |
| | | em # Description | Quantity | Unit Price Total |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| AMOUNT DUE | OUNT DUE | MOUNT DUE | | |

To add a form to a Form Set, click on the "Add Form to Form Set" icon on the toolbar.

| IQforms Designer - NewFormSet.frs* | |
|------------------------------------|--------|
| File Edit Tools Help | |
| 🗋 🖉 🔚 🙀 🖌 🗅 🗀 🗶 🕞 🖪 | BC AB(|
| Form Set Add Form to Form Set | |
| Accounts Receivable | |

You will be prompted to select a new form image. Select the tiff image that will be used to create the new form template. In the example below, the "Invoice – Blank" TIFF image is selected. Click "Open" to add the image to the Form Set.



When the image is imported, the Form Set is updated as shown in the example below.

The image will be displayed on the right-hand side. In the Form Set tree view, a form item with the name of the selected image is added below the Accounts Receivable Form Set. The Settings window will change to show the General settings for the form template.

| IQforms Designer - NewFormSet.frs* | |
|------------------------------------|--|
| File Edit Tools Help | |
| 🗈 🧏 🔚 📭 🛷 🗅 🗋 🗙 🕟 🚱 🔤 | - V [] |
| Form Set | |
| | |
| Accounts Receivable | |
| | |
| | |
| | Invoice informa |
| | software |
| | REMIT TO: INVOICE NUMBER: Informa Schware INVOICE DATE: |
| | Orlando, FL 32810 |
| | BILLTO: SHIP TO: |
| Settings | |
| | Item # Description Quantity Unit Price Total |
| General | |
| Form INVOICE - Blank | |
| Document Type: | |
| Document Group: 5 🔻 | |
| Field Minimum Confidence: | |
| Needs OCR Number of Fields: 0 | |
| Multiple Page Field | |
| Static Values | |
| · · · | AMOUNT DUE |
| Attribute Value | |
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| U | |

Rename a Form

Select the image name in the Form Set tree view, type in the new name and press Enter. In the example below, the image name is changed to "Invoice".



The Form field will update to reflect the name change and as will the associated Form field in the General settings tab.

| Settings: |
|-------------------------------|
| General Form Invoice |
| Document Type: |
| Document Group: 5 🔻 |
| Field Minimum Confidence: |
| Needs OCR Number of Fields: 0 |
| Multiple Page Field |
| Static Values |
| ▼ + |
| Attribute Value |
| |
| |
| |
| |
| |

The ImageQuest Document Type that will be assigned to the form template must be selected. In the example below, "Invoice" is selected from the list.

| Settings: | | |
|------------------------|---|--|
| General Form Invoice | | |
| Document Type: | | |
| Document Group: | Name | |
| Field Minimum Confiden | GLCode Invoice | |
| Needs OCR | MFP Scan [®] Personnel File | |
| 🗌 Multiple Page Field | Vendor File | |
| Static Values | | |

NOTE: The Document Type must already exist in ImageQuest in order to select it from the Document Type list. Also, the ImageQuest attributes should match the field names on the template.

Settings – General Properties

Some of the additional options available under the General tab include:

Document Group - Select this option to assign all the forms to a certain Document Group in ImageQuest. For more information on Document Groups, see the ImageQuest Administrator's Guide.

Field Minimum Confidence - The minimum recognition setting for a field. This is the minimum setting for IQ forms to recognize the data in the field. The default value is "0".

Needs OCR - Select this option to process the form in ImageQuest's OCR process. This option allows for tiff's to be converted to PDFs and full text extraction to be performed for keyword searches. PDFs are also processed in OCR, however, they remain in PDF format and also have full text extraction performed on them for keyword searching. For more information on the ImageQuest OCR process, please see the ImageQuest Administrator's Guide.

Multiple Page Field - This value is used if there are 2 or more pages to a form with a common field on both. For example, if the same Invoice Number is on both page 1, 2, 3, 4, etc. IQforms will recognize those pages as one document and continue until it encounters the next unique Invoice Number and start a new document.

Static Values - This feature allows the form to always have certain values for each attribute. This only applies to form fields. Static values are attributes in ImageQuest. See page 22 for more information on Static values.

In the example below, the following options are configured:

- Document Group "ORLANDO" is selected from the list
- Needs OCR is checked
- Multiple Page Field is checked and "InvoiceNumber" is selected from the list
- "Paid" is selected from the Static Values list

| Settings: | | |
|------------------------------|----------------|---------------------|
| General | | |
| Form Invoice | | |
| Document Type: | Invoice | • |
| Document Group: | ORLANDO | 5 * |
| Field Minimum Confid | ence: 0 + | |
| Needs OCR | ٨ | Number of Fields: 3 |
| Multiple Page Fiel | d InvoiceNumbe | er 💌 |
| Static Values | | |
| State values | • | + |
| MfpHostName MfpToputLiser | | |
| MfpSerial | | |
| Paid | | 0 |
| Vendor Number | | |
| VendorName | | · |
| | | |
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See the next page for more information on using Static Values.

Static Values

Static Values apply to fields that will always have the same value when processed by IQforms. Static Values can apply to an actual field on the form or a field that is not on the form. In either case, the Static Value field must exist as an attribute in ImageQuest.

For example, the Invoice form should always have a field called "Paid" and the default or static value should be "False". The form itself will not have a field called "Paid".

In the example below, the ImageQuest True/False attribute "Paid" is selected and the True/False checkbox is displayed. The checkbox is left unchecked so the default value will be "False".



Click + to add Paid to the Static Values list.

| I▼ Multiple Pag | e Field Invoicendimber | <u> </u> |
|-----------------|------------------------|----------|
| Static Values | | |
| Paid | 🔻 🗌 Paid | |
| Attribute | ▲ Value | - Ji |
| Paid 🔶 | False | × |

With this configuration, every Invoice form processed by IQforms will include the "Paid" attribute and the value will be "False". The value can be changed to "True" in ImageQuest any time after IQforms has processed the form.

Another example could be Vendor Number. If the Invoice forms being processed all pertain to the same Vendor Number, Vendor Number could be added as a Static Value

The ImageQuest Text attribute "Vendor Number" is selected from the list and "12345" is typed into the entry field.



Note: to clear the value in the entry field, click the undo button as highlighted below.



Click + to add Vendor Number to the Static Values list.

| I▼ Multiple Page Fle | | • |
|----------------------|-----------|---|
| Static Values | | |
| Vendor Number | ▼ 12345 5 | + |
| Attribute | ▲ Value | |
| Paid | False | × |
| Vendor Number | 12345 | x |

To remove a Static Value from a form, click the 🗙 on the entry to be removed. In the example below, "Vendor Number" is removed from the form.

| era finvoicenamber | <u> </u> |
|--------------------|-------------------------|
| | |
| • | + e |
| ▲ Value | |
| False | × |
| 12345 | - (\ |
| | Value False 12345 |

Now "Paid" is the only Static Value for the form.

| I▼ Pluitiple rage | | Invoicentumber | |
|-------------------|---|----------------|-----|
| Static Values | | | |
| Vendor Number | | - | t - |
| Attribute | * | Value | |
| Paid | | False | × |

Adding Fields to a Form

Next, determine which form fields you would like to retrieve data from on the form.

OCR Tool

In this example, we are using the OCR tool to read the machine printed values for INVOICE NUMBER, INVOICE DATE and SHIP TO fields. To define these fields in IQforms Designer, select the OCR Tool icon on the toolbar:



The cursor will change to a "+" sign once you drag it over the template image.

| C | | | |
|---|---------------------------------------|---------------------------|--|
| | | | |
| | | | |
| | | | |
| | | | |
| | (+) | informa | |
| | | INVOICE software | |
| | REMIT TO: | INVOICE NUMBER: | |
| | 123 Baker Street Orlando, FL 32810 | INVOLE DATE: | |
| | BILL TO: | SHIP TO: | |
| | | | |
| | Item# Description | Quantity Unit Price Total | |
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Select the area you would like to read data from by left-clicking and dragging the cursor around the field. The field will be highlighted in blue as shown here:



Release the mouse and the field will be selected as shown below.

|): Software r Street FL 32810 | INVOICE | informa s of t ware |
|--|---------|------------------------|
| | сшр | |

A new field item called "Field 1" is added to the form item in the Form Set tree and the form Settings window reflects the options for configuring the form field.

See below for example and information about options available in the General tab.

| Form Set |
|--|
| Accounts Receivable |
| |
| Cattinger |
| Settings: |
| General ScanFix Xpress Dropout OCR Field Field 1 Field Minimum Confidence: □ Regular Expression: □ □ Location & Size □ Values 1853, 503, 317, 87 |

Field – The name of the form field

Field Minimum Confidence - The minimum recognition setting for a field. This is the minimum setting for IQ forms to recognize the data in the field. The default value is "0".

Regular Expression - Used to help improve data recognition for fields that have a specific format

Location and Size – Location and size of the field on the form

Rename a Form Field

Change the name of a Form Field to an ImageQuest Attribute name related to the data to be captured.

There are two ways to change a form field name. In the examples below, the field name is renamed to "InvoiceNumber".

Option 1 - Select "Field1" in the Form Set tree, type in the new name and press Enter.



Option 2 – In the General tab, highlight "Field1" and begin typing in the name. The list of available ImageQuest attributes will appear. Select the correct attribute for the field name. In the example below, the letter "I" is entered and the list of attributes beginning with the letter "I" are displayed.

| Settings: |
|---|
| General Scan Fix Xpress Dropout OCR |
| Field M InvoiceNumber Regula |
| □ Location & Size Walues 1853, 503, 317, 87 |
| |
| |
| |
| |
| |

When the name is changed in the Form Set or Settings window, it will automatically update in the associated field in the other window.

| Form Set | |
|--------------|--------------------------|
| Accounts R | Receivable biceNumber |
| Settings: | |
| General Scar | x Xpress Dropout OCR |

Regular Expression

A Regular Expression can be used to help improve data recognition for fields that have a specific format. From example, the InvoiceNumber should be all digits and only 6 characters in length. In the example below, the Regular Expression entered is [0-9]{6}. For more information about Regular Expressions and how to configure them, see www.regexlib.com for more information.

| Settings: | |
|------------------------------------|-----|
| | Γ |
| General ScanFix Xpress Dropout OCR | . 1 |
| Field InvoiceNumber | 11 |
| Field Minimum Confidence: 0 = | |
| Regular Expression: 10-9](6) | |
| E Location & Size | |
| EI Values 1957 505 217 69 | |

Location & Size – These are the values that represent the location and size of the OCR, OMR or ICR field that have been defined on the form. These can be changed manually by selecting the value and changing it.

| Values | 1857, 505, 317, 69 | |
|--------|--------------------|--|
| X | 1857 | |
| Y | 505 | |
| Width | 317 | |
| Height | 69 | |

Settings – ScanFix Xpress

Choose the ScanFix Xpress properties that you want to be processed on the field after dropout occurs.

| Settings: | |
|---|--|
| General ScanFix Xpress Propout Blob Removal Properties Area X-Coordinate 0 Mini Area Y-Coordinate 0 Maxi Area Width 0 Area Height 0 | OCR mum Pixel Count 300 mum Pixel Count 9995 Minimum Density 50 |
| Blob Removal Border Removal Comb Removal Deskew Despeckle Dilate Dot Shading Removal Erode Inverse Text Correction Line Removal Smoothing | |

For more information about the ScanFix Xpress field properties, please select Help > Contents in IQforms Designer.

Settings – Dropout

Dropout is a process by which the pre-printed content on an image is removed, leaving only the data that was added to a form. When filled data and template data overlap, the filled data will be reconstructed as accurately as possible.

| Settings: | |
|-------------------------------------|--|
| General Scan Fix Xpress Dropout OCR | |
| Dropout Method Dropout | |
| Allowable Mis-registration 5 💼 | |
| Perform Reconstruction 🔽 | |
| | |
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For more information about the Dropout field properties, please select Help > Contents in IQforms Designer.

Settings – OCR

OCR (Optical Character Recognition) is the process of converting machine printed information into editable text. Below are the default settings:

| Settings: |
|---|
| General Scan Fix Xpress Dropdut OCR |
| Language Western European |
| Character Set All Characters |
| Field Type General Text |
| Minimum Character Confidence 30 |
| Multiple Text Lines 🔽 Rejection Character 🦳 |
| Split Merged Characters 🔽 Detect Spaces 🔽 |
| Split Overlapping Characters I⊻ |
| |
Character Set

The Character Set list contains commonly used formats that, depending on the selection, can help improve data recognition.

For example, the data for InvoiceNumber will be digits, like "123456". To improve recognition for InvoiceNumber, "Digits" is selected for the expected Character Set. IQforms will expect this field to have characters in the range of 0 - 9 and any combination of those characters.

| Settings: | | | | | | |
|---|--|--|--|--|--|--|
| General ScanFix Xpress Dropout OCR | | | | | | |
| Language Western European 💌 | | | | | | |
| Character Set Custom Edit | | | | | | |
| Field Type General All Alphas All Characters | | | | | | |
| Alpha Numeric Minimum Character Arithmetic | | | | | | |
| Maximum Arithmetic Symbols | | | | | | |
| Minimum Text LCurrency Symbols | | | | | | |
| Multiple Te Lower Case Character | | | | | | |
| Split Merged Ch Punctuation | | | | | | |
| Split Overlapping Ch Custom | | | | | | |
| | | | | | | |

If the InvoiceNumber format was "INF12345", the "Custom..." Character Set would be useful. The next few pages provide an example of how the Custom option could be configured.

Select Custom and then click Edit.

| Settings: |
|---|
| General Scan Fix Xpress Dropout OCR Language Western European Character Set Custom |
| Field Type General Text |
| Minimum Character Confidence 30 Maximum Blob Size 0 Minimum Text Line Height 8 |
| Multiple Text Lines 🗹 Rejection Character 🏹 |
| Split Merged Characters 🔽 Detect Spaces 🔽 |
| Split Overlapping Characters 🔽 |

The Edit Custom OCR Character Set dialog opens.

| Edit Cu | ısto | m () | CR (| har | acte | r Se | t | | | | | | | | | | | | | | | | | | | |
|-----------|------------------------------------|-------|------|-----|-------|-------|-------|---------------|-------|---------------|--------|---------------|-------|-----|-----|---|----|---|---|---|---|---|---|---|---|---|
| Langua | Language Western European | | | | | | | | | | | | | | | | | | | | | | | | | |
| Upper C | Case | Alp | ha — | | | | | | | | | | | | | | | | | | | | | | | Punctuation |
| | Α | ☑ | В | ◄ | С | ◄ | D | ◄ | Е | ◄ | F | ◄ | G | ◄ | Н | ◄ | T. | ◄ | J | ◄ | Κ | ◄ | L | ☑ | Μ | 8 4 8 4 4 7 5 7 |
| ☑ | Ν | ☑ | 0 | ◄ | Ρ | ◄ | Q | $\overline{}$ | R | $\overline{}$ | S | ◄ | Т | ◄ | U | ◄ | ۷ | ◄ | W | ◄ | Х | ◄ | Y | ☑ | Ζ | · · · · · · · · · · · · · · · · · · · |
| | À | ◄ | Á | ◄ | Â | ☑ | Ã | ◄ | Ä | ◄ | Å | | Æ | • | ç | ◄ | È | ◄ | É | ◄ | Ê | ◄ | Ë | ☑ | ì | V - V . V . V ; V ; |
| | í | ~ | î | ☑ | ï | ☑ | Ñ | • | Ò | • | Ó | ☑ | Ô | • | Õ | ◄ | Ö | • | ø | ☑ | Ù | ~ | Ú | ☑ | Û | [\vee \vee \vee \vee \vee \vee \vee \ve |
| | Ü | | | | | | | | | | | | | | | | | | | | | | | | | ㅋ . ㅋ . ㅋ . ㅋ |
| | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Lower (| Case | e Alp | ha - | | | | | | | | | | | | | | | | | | | | | | | Digits |
| ~ | а | ~ | b | ~ | с | ◄ | d | ◄ | е | • | f | ◄ | g | ☑ | h | ☑ | i | ◄ | i | ☑ | k | ~ | Т | ☑ | m | v 0 v 1 v 2 v 3 v 4 |
| ~ | n | V | ο | ~ | р | ◄ | q | • | r | • | s | ◄ | t | ☑ | u | | v | • | w | ◄ | x | • | у | • | z | ▼5 ▼6 ▼7 ▼8 ▼9 |
| ☑ | à | ☑ | á | ✓ | â | ◄ | ã | ◄ | ä | ◄ | å | $\overline{}$ | æ | ◄ | ç | ◄ | è | ◄ | é | ◄ | ê | ◄ | ë | ☑ | ì | Currency Symbols |
| ~ | í | ~ | î | ◄ | ï | ◄ | ñ | ◄ | ò | ◄ | ó | ◄ | ô | ◄ | õ | ◄ | ö | ◄ | ø | ◄ | ù | ☑ | ú | • | û | ▼\$ ₹ € ₹ ¢ ₹ ¥ |
| | ü | ~ | ß | | | | | | | | | | | | | | | | | | | | | | | Arithmetic Symbols |
| | | | | | | | | | | | | | | | | | | | | | | | | | | $\nabla + \nabla < \nabla = \nabla >$ |
| All Alpha | All Alphas Check Uncheck OK Cancel | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | (| (or R | ight- | Click | Gro | up fo | r cor | itext- | sens | itive | mer | าน) | | | | | | | | | | | |

Select "All Alphas" and click "Uncheck".

| All Alphas 💌 | Check | Uncheck | |
|--------------|----------------------|----------------------------|-----|
| | (or Right-Click Grou | p for context-sensitive me | nu) |

Note: You can also right-click on a group of characters to access this option.

All Upper Case Alpha and Lower Case Alpha characters are unchecked.

| Edit Custom OCR Character Set | × | | | | | | |
|--|--|--|--|--|--|--|--|
| Language Western European | | | | | | | |
| Upper Case Alpha A B C D E F G H I J K L M N O P Q R S T U V W X Y Z À Á Â Ä Ä Å Æ Ç È É Ë Ì Í Î Î Ñ Ò Ó Õ Ö Ø Ŭ Ú Ü Ü Ü I I N I <td< td=""><td>Punctuation □ ! □ " □ # □ % □ & □ ' □ (□) □ * □ , □ - □ . □ / □ : □ ; □ ? □ @ □ [□ \ □] □ { □ □ } □ , □ ; □ ? ∞ @ □ [□ \ □] □ { □ □ } □ ; □ . □ ;</td></td<> | Punctuation □ ! □ " □ # □ % □ & □ ' □ (□) □ * □ , □ - □ . □ / □ : □ ; □ ? □ @ □ [□ \ □] □ { □ □ } □ , □ ; □ ? ∞ @ □ [□ \ □] □ { □ □ } □ ; □ . □ ; | | | | | | |
| Lower Case Alpha a b c d e f g h i j k l m n o p q r s t u v w x y z a á â â ã ã ă â cê c î ê c î î î î î î î î î î î î î î | Digits $\overrightarrow{v} \ 0 \ \overrightarrow{v} \ 1 \ \overrightarrow{v} \ 2 \ \overrightarrow{v} \ 3 \ \overrightarrow{v} \ 4$ $\overrightarrow{v} \ 5 \ \overrightarrow{v} \ 6 \ \overrightarrow{v} \ 7 \ \overrightarrow{v} \ 8 \ \overrightarrow{v} \ 9$ Currency Symbols $\overrightarrow{v} \ \$ \ \overrightarrow{v} \ \pounds \ \overrightarrow{v} \ \pounds \ \overrightarrow{v} \ \ddagger \ \overrightarrow{v} \ \ddagger$ Arithmetic Symbols $\overrightarrow{v} \ + \ \overrightarrow{v} \ < \ \overrightarrow{v} \ = \ \overrightarrow{v} \ >$ | | | | | | |
| All Alphas Check Uncheck OK Cancel (or Right-Click Group for context-sensitive menu) | | | | | | | |

Check the boxes for "I", "N" and "F" since these characters are expected to be present for the InvoiceNumber value.

| Edit Custom OCR Character Set | X |
|--|---|
| Language Western European | |
| | |
| PNCOFPEQERESETEUEVEWEXEYEZ | V V V V V V V V V V |
| | ▼ - ▼ . ▼ / ▼ : ▼ ; |
| | [/] 0 |
| | v (v) v , v , v , v , v , v , v , v , v , |
| Lower Case Alpha | Digits |
| □ a □ b □ c □ d □ e □ f □ g □ h □ i □ j □ k □ l □ m | 0 7 1 7 2 7 3 7 4 |
| 「 n Г o Г p Г q Г Г Б Б Т Г U Г V Г W Г X Г Y Г Z | ▽ 5 ▼ 6 ▼ 7 ▼ 8 ▼ 9 |
| | Currency Symbols |
| ΓίΓῖΓϊΓῆΓὸΓόΓὃΓὄΓὄΓωΓùΓúΓû | ▼\$ ▼€ ▼¢ ▼£ ▼¥ |
| □ ü □ ß | Arithmetic Symbols |
| | $\overline{\mathbf{v}} + \overline{\mathbf{v}} < \overline{\mathbf{v}} = \overline{\mathbf{v}} >$ |
| All Alphas Check Uncheck (or Right-Click Group for context-sensitive menu) | OK Cancel |

Right-click on the Punctuation group and select "Uncheck All "Punctuation"".



All Digits should remain checked. Right-click the Currency Symbols and Arithmetic Symbols groups to uncheck all.



Click "OK" to return to the OCR tab. With this Custom configuration, IQforms will expect to see InvoiceNumber values in the following format: "INF#####".

Field Type

Field Type provides options for commonly used data formats such as Currency, Date and Social Security Number to help improve recognition. For example, if the expected data is a phone number, you could select "United States Phone Number" for Field Type and IQforms would expect to see a format like (123) 456-7890.

In the example below, "General Text" is selected for the InvoiceNumber field since it best matches the data expected in that field.

| Settings: |
|---|
| General Scan Fix Xpress Dropout OCR |
| Language Western European |
| Character Set Digits |
| Field Type General Text |
| Minimum Ch Currency Plus |
| N Date Email |
| Minimu General Text Social Security Wimber |
| Mu Time Character |
| Split MeURL ect Spaces |
| Split Overlapping Characters 🔽 |
| |

For more information about the OCR field properties, please select Help > Contents in IQforms Designer.

Note: The tabs at the form level apply to the entire page. Tabs at the field level apply only to that field.

Other Field Options

Resize a Field

NOTE: To resize the Ocr fields, select the kick icon and click on the field you want to resize. Drag the black squares as needed to resize the field.



Zoom in on a Field

To zoom in on a certain field on the form, select the field on the form or in the field list and click the "Zoom In" button on the Forms Designer toolbar. In the example below, the BILL TO field is selected.

| | INVOICE |
|--|----------------------------|
| REMIT TO: Informa Software 123 Baker Street Orlando, FL 32810 | INVOICE NUI INVOICE DAT |
| | SHIP TO: |
| Item # Description | Quantity |

Click Zoom In



Now the BILL TO field in zoomed in so it's easier to see and modify as desired.

| 52010 | |
|----------|----------|
| BILL TO: | 52010 |
| | BILL TO: |
| | |

Delete a Field

To delete a field from the form, select the field on the form or in the field list and press the Delete key or click the "Delete" button on the Forms Designer tool bar.

In the example below, the BILL TO field is selected.



Press the Delete key or click the Delete



Click "Yes" to confirm and delete the field from the form and the field list or "No" to retain the field.

Note: The Delete button can also be used to delete a form from a Form Set.

Continue to add and configure additional form fields as needed. In the example below, the InvoiceDate and VendorName fields have been added to the form. The arrows show the relationship between the fields in the field list and their respective locations on the form.



Saving a Form Set

Any changes that are made to a Form Set should be saved. Notice that after making changes to the below template, an asterisk shows appears after the file name in the title bar. This means that the Form Set has changes that need to be saved.



Click "Save Form Set" in the Forms Designer toolbar.



Note: Save Form Set is also available from the File menu or by pressing Ctrl+S.

The "Save Form Set As" dialog will open as shown below.

Browse to a location to save the Form Set and enter a File name for the Form Set. In this example, the File name is changed to "Accounts Receivable"

Click "Save" to save the Form Set.

| 🖥 Save Form Set As | | | | × |
|---|---------------------|-----------------|--------|---|
| | - 🛃 | Search Formsets | | 2 |
| Organize 🔻 New folder | | | = • | |
| Favorites Name * | | Date modified | Туре | |
| Particles Pesktop Downloads S Recent Places | No items match your | · search. | · | |
| Libraries Documents Music Pictures Videos | | | | |
| 1 Computer | | | | |
| | | | | Þ |
| File name: Accounts Receivable | | | | • |
| Save as type: Form Set Files (*.frs) | | | | • |
| Hide Folders | [| Save | Cancel |] |

When a Form Set is saved, a FormAssist folder and a .frs file are created using the FormSet name.

| Name * | Date modified | Туре | Size |
|----------------------------------|-------------------|-------------|------|
| 퉬 Accounts Receivable.FormAssist | 7/19/2013 1:12 PM | File folder | |
| Accounts Receivable.frs | 7/19/2013 1:12 PM | FRS File | 4 KB |

The FormAssist folder contains the .frd file (or Form Definition File) which is the actual form template with the name of the image file that was used to create the form.

| Name * | Date modified | Туре | Size |
|---------------------|-------------------|----------|-------|
| INVOICE - Blank.frd | 7/19/2013 1:12 PM | FRD File | 24 KB |

A Form Set can be saved anywhere, but it is recommended that you create a new folder called Formsets in the IQforms directory. By default, this location is C:\Program Files (or Program Files (x86))\Informa Software\ImageQuest\IQforms.

Testing a Form

IQforms Forms Designer provides the ability to test a form to see how IQforms reads the data from the fields that were configured. To test a form, you must have a TIFF or PDF image that matches the form layout that has data for the fields that IQforms will recognize. When using a TIFF image, the image properties must match the properties of the TIFF that was used to create the form.

The Invoice example below will be used for testing.

| | INVO | DICE | s of tw | ma are |
|---|--|--|--------------------------------|--------------------------------------|
| REMIT TO: Informa Softwa 123 Baker Stre Orlando, FL 32 | are et 2810 | INVOICE | NUMBER: 8684 DATE: 10/0 | \$70)1/12 |
| | BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432 | SHIP TO: Big Corp. 345 Oak Parkwa Stillwater, OK 75 | y 5622 | |
| ltem # | Description | Quantity | Unit Price | Total |
| 7G802 7G902 PEN100 PEN102 | Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU | 10 10 200 200 | 25.50 28.00 0.75 0.75 | 255.00 280.00 150.00 150.00 |
| AMOUNT DUE | | | | 835.00 |

In IQforms Forms Designer, click the "Process Forms" button on the toolbar.



Browse to and select the test file. Click Open to launch the Process Forms window.



Process Forms

The Processing tab shows the progress of the IQ forms process as it reads the original image, enhances the image for processing, identifies which form matches the image and then aligns the original image to the form.



Identification Statistics

The Identification Statistics tab lists the full results from the filled image identification process. This includes the list of template images in the Form Set and the corresponding filled image identification confidence values for each form at each considered rotated orientation. Rotations that were not considered during identification are left blank.

| IQforms Designer - Process Forms | | | | | |
|--|--------------|---------|------|------|------|
| Processing Identification Statistics End Results Timing Re | outo Ì | | | | |
| Name | 00115 [| on• I | 1900 | 270° | |
| Invoice | .98 | .9 | 22 | 9 | |
| | | - | | - | |
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| | | | | | |
| | | | | | |
| Current Image Filled Image 1 of 1: C:\Users\Administrator\Desktop\Invoice | e - Test | Image.t | tif | | |
| | | | | | Exit |
| | | | | | |

Field Results

The Field Results tab shows the results of the data recognition for each field that is configured on the form.

In the example below, the result returned for InvoiceNumber is "868470" as shown in the Results box. The Text Block Result section shows the confidence level on this field was at 98%. This means that IQforms was 98% confident of the data it read.

| 📝 IQforms Designer - Process Forms | | |
|--|---|------|
| Processing Identification Statistics Field Result Invoice Invoice Invoice Date Vendor Name | Its Timing Results | |
| | 868470 | |
| | Field Name: InvoiceNumber Recognition Type: OCR Field Bounds: Left = 1857, Top = 505, Width = 317, Height = 69 Results: 868470 | A |
| | 1 Text Line First Line First Type: SeveralText Confidence: 988 05 Ten = 26 Width = 127 Height = 20 | |
| | Rectangle: Left = 95, Top = 36, Width = 137, Height = 29 | • |
| Current Image Filled Image 1 of 1: C:\Users\Administrator\I | Desktop\INVOICE (2).tif | Exit |

The InvoiceDate and Vendor Name fields were returned with the correct values as shown below and the Confidence levels are 86% and 78% respectively.





Timing Results

The Timing Results tab provides information related to the filled-in form processed against the Form Set. It lists the image actions performed, filled-in form duration, success status, total duration, average duration, the number of filled images processed, and the number of filled images identified.

| 1Qforms Designer - Process F | orms | | _ | | |
|---|----------------------------|----------------------|-------------------|------------------|------|
| Processing Identification Statist | tics Field Results Timin | g Results | | | |
| | Form Duration | Success | Total Duration | Average Duration | |
| Form Open | 0.002 | Yes | 0.002 | 0.002 | |
| Enhancement | 0.000 | Yes | 0.000 | 0.000 | |
| Identify & Align | 0.112 | Yes | 0.112 | 0.112 | |
| Process 3 Fields | 0.195 | Yes | 0.195 | 0.195 | |
| Total | 0.309 | | 0.309 | 0.309 | |
| | | All processing mea | asured in seconds | | |
| Number of filled images proc | essed: 1 | | | | |
| Number of filled images iden | tified : 1 | | | | |
| | | | | | |
| | | | | | |
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| | | | | | |
| Current Image Filled Image 1 of 1: Cilliners | | voice - Test Image t | if | | |
| r med image r or r. c.iosers | - Manimian atombes (top in | voice - rest image.t | | | Exit |
| | | | | | |
| | | | | | |

Note: Only one image can be tested at a time. Multi-page documents can be tested but the test process in Designer only reads the first page. The multi-page document would have to be broken down into individual 1-page scans in order to read additional form scans in that particular document.

Once the test is complete, click "Exit" to close the Process Forms window. If you are not satisfied with the results, you can modify the Field settings and test the image again. For example, if the InvoiceDate read as "O1%01/12" and the actual value is "10/01/12", you may want to modify the ScanFix Xpress or OCR settings for that field and then save the Form Set and test the image again.

Add Form Set Configuration

Once a Form Set has been created and saved, it will need to be added to the IQforms Configuration before it can be used in production.

To start, open the IQforms Console.

| 🗐 IQforms | |
|--------------------------|---|
| i 🕨 🥝 🗽 🛠 | |
| Service Status = Running | _ |
| | |
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| | - |
| | |
| Ready. | |

Click Edit Configuration in the IQforms Console to open the IQforms Configuration window.



The IQ forms Configuration window allows users to add configurations for Forms, Barcodes and Checks.

Click "New" to open the Mode Properties dialog.

| orms Configu | ration | | | | | |
|--------------|--------|--------------|------------|--------|----------------|---------|
| Cabinet Name | Mode | FailureQueue | FolderPath | | EnableNonForms | isValid |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | Delete | Edit | NewN |

Mode Properties defines the properties for a particular Form Set.

Click the FormSet Path ellipsis to select the Form Set .frs file.

| Mode Properties | | X |
|-----------------|-----------------|-------------|
| Mode: | Forms | |
| Cabinet Name: | ImageQuest | * |
| Failure Queue: | | * |
| Folder Path: | | |
| FormSet Path: | | () |
| | Enable Nonforms | \bigcirc |
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| | | Savo Cassal |
| | | Save Cancel |

Browse to the location of the Form Set to be configured, select the .frs file and click "Open".

In the example below, the Accounts Receivable.frs file is selected.

| Open | | | | | × |
|-----------------------|----------------------------------|-------------------|-------------|--------|------|
| G v ImageQues | st ▼ IQforms ▼ Formsets ▼ | 👻 🚱 Search Fe | ormsets | | 2 |
| Organize 🔻 New folder | | | | - | 0 |
| ★ Favorites | Name * | Date modified | Туре | Size | |
| Nesktop | 鷆 Accounts Receivable.FormAssist | 7/19/2013 1:12 PM | File folder | | |
| Downloads | Accounts Receivable.frs | 7/22/2013 2:47 PM | FRS File | | 4 KI |
| Recent Places | | | | | |
| 🥽 Libraries | | | | | |
| Documents | | | | | |
| Music Distance | | | | | |
| Videos | | | | | |
| | | | | | |
| 🖳 Computer | | | | | |
| <u> </u> | • | | | | ► |
| File na | ame: Accounts Receivable.frs | | | | • |
| | | Оре | n | Cancel | |

Once the FRS file has been selected, the path will show in the FormSet Path section. Click "Save".

| Mode Properties | × |
|-----------------|--|
| Mode: | Forms |
| Cabinet Name: | ImageQuest 🔹 |
| Failure Queue: | |
| Folder Path: | |
| FormSet Path: | C:\Program Files (x86)\Informa Software\ImageQuest\IQfor |
| | Enable Nonforms |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | R |
| | |
| | |
| | |
| | Save Cancel |

The Mode Properties window will close and IQforms Configuration will display the Form Set configuration to include the Form Set FailureQueue and FolderPath for the selected .frs.

The "isValid" column indicates that the FRS file can be read without error and is not corrupt.

| abinet Name | Mode | FailureQueue | FolderPath | EnableNonForms | isValid |
|-------------|-------|----------------------|--------------|----------------|---------|
| nageQuest | Forms | Administrator (User) | C: \AR Forms | Yes | Yes |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Click the **X** to close the IQforms Configuration.

To delete or edit an existing IQ forms Configuration, select the configuration in the list and click Delete or Edit.

NOTE: Any changes that need to be made to an IQforms Configuration or Form Set file require restarting the IQforms Service in order for those changes to take effect.

Processing Forms

The IQ forms Service must be running so it can poll all configured Folder Paths for new images to be imported and processed by IQ forms.

For this example, the invoice below will be scanned to C:\AR Reports as INVOICE Scan1.tif.

| | INVO | DICE | intor ₅oftw | ma are |
|--|--|---|--------------------------------|--------------------------------------|
| REMIT TO: Informa Softv 123 Baker Str Orlando, FL 3 | ware cet 32810 | INVOICE | E NUMBER: 8684 E DATE: 10/0 | 170 01/12 |
| | BILL TO: Big Corp. P.O. Box 102332 Norman, OK 75432 | SHIP TO: Big Corp. 345 Oak Parkwa Stillwater, OK 7 | у 5622 | |
| ltem # | Description | Quantity | Unit Price | Total |
| 7G802 7G902 PEN100 PEN102 | Copy Paper – WHT, LTR Copy Paper – WHT, LEGAL Pen – BLK Pen – BLU | 10 10 200 200 | 25.50 28.00 0.75 0.75 | 255.00 280.00 150.00 150.00 |
| AMOUNT DU | E | | | 835.00 |

IQforms should identify the image as the Invoice form and read the data for the following fields: INVOICE NUMBER, INVOICE DATE and the first line for BILL TO.

The IQforms Console window allows users to monitor scans that are being or have been processed. The IQforms console window continuously logs what items it is processing and it can also be used to stop/start the IQforms service and edit IQforms configurations. The IQforms Console does not need to be running in order for IQforms processing to occur.

When files are processed through IQforms, the IQforms Console will show the progress. The progress for INVOICE scan1.tif is displayed in the example below.

| 📄 IQforms | | | _ 0 | × |
|--|---|---|------------|---|
| i 🕨 🥝 🗽 🛠 | | | | |
| 5/16/2014 2:06:01 PM: 5/16/2014 2:06:02 PM: 5/16/2014 2:06:02 PM: 5/16/2014 2:06:03 PM: 5/16/2014 2:06:04 PM: 5/16/2014 2:06:04 PM: 5/16/2014 P | Information Information Information Information Information | Starting batch 91e15eb5-8769-4109-871b-6ff2e8801328 from file C:\AR Forms\INVOICE = Processing 1 forms. Created 1 document(s) from form(s). Saved 1 document(s) into IQ. Processing complete for C:\AR Forms\INVOICE scan1.tif. | scan1.tif. | 4 |

The progress information will include how many forms were processed from the image, how many documents were created from the image and how many documents were saved to ImageQuest. The last status shows "Processing complete for C:\AR Forms\INVOICE scan1.tif".

Based on the information provided, processing for the INVOICE scan1.tif was successful.

The file was processed successfully and sent into ImageQuest as an Invoice document with the data from the three fields that were configured on the form: InvoiceNumber, InvoiceDate, and Vendor.



If "Need OCR" was enabled for the form, the IQ Ocr and Fulltext service will extract any readable text for keyword searching and convert the .tif file into a Searchable PDF.

If an image cannot be processed due to an issue with form identification, the progress information will indicate that the batch has failed because it contains unrecognized forms and it has been saved into the IQ exception queue for verification.

| 📄 IQforms | |
|---|---|
| i 🕨 🥝 🗽 🛠 | |
| 5/16/2014 2:42:02 PM: Informa 5/16/2014 2:42:03 PM: Informa 5/16/2014 2:42:03 PM: Error 5/16/2014 2:42:03 PM: Informa 5/16/2014 2:42:03 PM: Informa | tion Starting batch 9c183b3a-1097-4e67-88c2-f0c65016085e from file C:\AR Forms\INVOICE scan2.tif. <u>tion Processing 1 forms</u> . Batch has been failed because it contains unrecognized forms. tion Batch saved into IQ exception queue for verification. tion Processing complete for C:\AR Forms\INVOICE scan2.tif. |

All IQ forms exceptions will be added to the Failure Queue that was configured in the Form Set.

Items added to the Failure Queue will appear in the Indexing Queue of the ImageQuest User or Role that was configured for the Failure Queue.

In the example below, the batch was saved to the ImageQuest Administrator's Indexing Queue as Document Type "MFP Scan".

| Indexing Queue 🗴 | | | | | | | | |
|---|------------|----------|---------------|--------|--------|-----------|-------------|--------|
| | | | | | | | | |
| Drag a column header here to group by that column | | | | | | | | |
| Create Dat | Page Count | Document | Indexing R | Status | Locked | Mfp Input | Mfp Address | Mfp Ho |
| 5/16/2014 | 1 | MFP Scan | Administrator | × | | | | |
| | | | | | | | | |

When the batch is opened in Indexer, the image scanned does not match the layout of the Invoice form. Assuming this particular image was scanned by mistake, the user could delete the batch from the Indexing Queue and rescan the proper image for IQforms.



If an image cannot be processed due to an issue with field recognition, the progress information may indicate a warning that the image was recognized as a form but it requires verification.

In the example below, IQforms recognized INVOICE scan3.tif as an INVOICE form but something about the form requires verification.

| I | 📑 IQf | orms | | | | | | | | _ 🗆 × |
|---|-------------------------|----------------------|----------------------------|----------------------------|---|--|------|------------|---------------|------------|
| | | 0 | x 🛠 | | | | | | | |
| Г | Servi | ce S | tatus = | Runni | ing | | | | | A |
| | 5/16/ 5/16/ | 2014 2014 | 2:52:0 | 3 PM: 4 PM: | Information Information | Starting batch 3687186f-96b7-4df6-b4cd-b47790c165dc Processing 1 forms. | from | file C:\AF | Forms\INVOICE | scan3.tif. |
| | 5/16/ 5/16/ 5/16/ | 2014 2014 2014 | 2:52:0 2:52:0 2:52:0 |)4 PM:)4 PM:)4 PM: | Warning Form at Information Information | page 1 recognized as INVOICE requires verification. Created 1 document(s) from form(s). Saved 1 document(s) into IQ. | 1 | | | |
| | 5/16/ | 2014 | 2:52:0 | 04 PM: | Information | Processing complete for C:\AR Forms\INVOICE scan3.t: | if. | | | |

All IQ forms exceptions will be added to the Failure Queue that was configured in the Form Set.

Items added to the Failure Queue will appear in the Indexing Queue of the ImageQuest User or Role that was configured for the Failure Queue.

In the example below, the batch was saved to the ImageQuest Administrator's Indexing Queue as Document Type "MFP Scan".

| Indexing Queue 🗙 | | | | | | | | |
|------------------|---|----------|---------------|--------|--------|-----------|-------------|--------|
| i 🕑 🔁 💥 | | | | | | | | |
| Drag a column | Drag a column header here to group by that column | | | | | | | |
| Create Dat | Page Count | Document | Indexing R | Status | Locked | Mfp Input | Mfp Address | Mfp Ho |
| 5/16/2014 | 1 | MFP Scan | Administrator | V | | | | |
| | | | | | | | | |

When the batch is opened in Indexer, the user can review and confirm what data fields could not be read properly by IQforms.

In the example below, the "Invoice" Document Type is already assigned which indicates IQforms was able to identify the form properly. IQforms was also able to recognize "Big Corp." for the Vendor field.

InvoiceNumber and InvoiceDate are flagged with a red x ¹²⁰ that indicates a problem with these fields.

| Indexing Queue 🗴 | | | | | | | |
|----------------------------|--------------------------|-------|--|--|---|--------------------------------|--------------------------------------|
| | | | | | | | |
| - 🗐 Commit 😑 Training Mode | 🕘 Pan 🜆 Select 😽 Close 🤤 | ð 🖗 | ৵ | | | | |
| Pages | Document Type Invoice | Zoom: | Entire | e Page 🔻 Rota | ite 90° Pr | int | Ŧ |
| | DocumentGroup | | | INVOI | CE | infori softw | na |
| | InvoiceNumber | | REMIT TO: Informa Softe 123 Baker Str Orlando, PL 3 | wane Veet 53810 | INVOICE NU INVOICE 04 | NECE - 2010 NE - 2010 | 79 1/12 |
| | InvoiceDate | | | 888.70): Big Carp. P.O. Bax 302882 Norman, OK 75432 | SHIP TO: Big Corp. 345 Ook Parloway Scilwater, OK. 75522 | | |
| | S • • | | bern A | Description | Quantity | Unit Price | Total |
| | Vendor | | 70902 70903 PEN100 PEN102 | Capy Paper – WHT, LTR Capy Paper – WHT, LEGAL Pen – BUC Pen – BUC | 20 20 200 200 | 25.50 28.00 0.75 0.75 | 255.00 268.00 150.00 150.00 |
| | Big Corp. 👻 👈 | | | | | | |
| | 🗋 Paid | | | | | | |
| | Route To: | | | | | | |
| | * 5 | | | | | | |
| | Message: | | | | | | |
| | * | | AMOUNT DU | E | | | 835.00 |
| | Cancel | | | | | | |
| Documents: 1 | | | | | | | |

The user can mouse over the red x to get an error description.

In the examples below, IQforms tried to read the value for INVOICE NUMBER and INVOICE DATE but it wasn't confident with the results.

| InvoiceNumber | |
|------------------------------------|---|
| 🝳 370 🕤 | |
| InvoiceDate | |
| Value uncertain, please review. | |
| | |
| InvoiceDate | |
| 🖗 + ts | |
| hs. | |
| Ve Value uncertain, please review. | η |

If the user looks at those fields on the actual form image, it is obvious that the data is nearly unreadable.



If the user is able to interpret or acquire the correct data, they can key it in and click "Commit" to add the Invoice document to ImageQuest.

| Indexing Queue 🗙 | | | | | | | |
|--------------------------|--------------------------|-------|---|--|---|--------------------------------|--------------------------------------|
| | | | | | | | |
| 🗐 Commit 📃 Training Mode | 🕘 Pan 📴 Select 😽 Close 🤤 | ə 🔶 🤅 | ₽ | | | | |
| Pages | Document Type | Zoom: | Entire P | age 🔹 Rota | te 90° Pr | int | Ŧ |
| 1 - Invoice | Invoice 👻 | | | | | | |
| | DocumentGroup | | | | | | _ |
| | - t | | | INVOIO | E | infori softw | na |
| | InvoiceNumber | | IMIT TO: | | INVOICE NUM | WEER: CO. | 78 |
| | 868470 5 | 10 | 13 Baker Street rlando, PL 32810 | , | HIGH DO | | 47.8.4 |
| | InvoiceDate | | BAL Big P.C No | ы. по: g Carp. 3. Bax 302182 ятная, ОК 75452 | SHIP TO: Big Corp. 345 Ook Parkway Scilwater, OK 75522 | | |
| | 10/1/2012 - 5 | | en # De | scription | Quantity | Unit Price | Total |
| | Vendor | 77 | 5802 Ca 9803 Ca 591300 Par 59182 Par | py Paper – WHT, LTR py Paper – WHT, LEEAL n – BLK n – BLU | 10 10 200 200 | 25.50 38.00 0.75 0.75 | 255.00 360.00 150.00 150.00 |
| | Big Corp. 🝷 🕤 | | | | | | |
| | 🖸 Paid | | | | | | |
| | Route To: | | | | | | |
| | - 5 | | | | | | |
| | Message: | | | | | | |
| | | Ā | MOUNT DUE | | | | 855.00 |
| | Cancel Commit | | | | | | |
| Documents: 1 | | | | | | | |

NOTE: It is highly recommended to test any IQforms forms or barcode process before going live – Scan what you plan to scan for each FRS or barcode configuration and confirm you're getting the proper results. If you do not, please contact support for help.

Other Recognition Types

ICR

ICR (Intelligent Character Recognition) is the process of converting hand printed information into editable text.

The steps for adding and configuring an ICR field are almost identical to the steps to configure an OCR field.

In the example below, a Form Set called "Surveys" is created and a Customer Survey form has been imported. The following fields will require hand written entry: First Name, Middle Initial, Last Name, and Email Address.

| IQforms Designer - Surveys.frs* | |
|--|--|
| File Edit Tools Help | |
| 🗈 🛿 🔚 📴 🛷 🗅 🗊 🗙 📐 🖎 🛲 🚟 | |
| Form Set | |
| Surveys | Customer Survey |
| | First Name Middle Initial |
| Settings: | |
| General Form [customer survey Document Type: Document Group: Field Minimum Confidence: Needs OCR Number of Fields: 0 Multiple Page Field Static Values Email Address Multiple Age Field Static Values Email Address Value | How long have you been a subscriber? How often do you travel? I = 4 years I Never I = 5.6 years I Every Year I g or more years I Every two or more years If you received a Promotion Code, please fill in the numbers in the section below. Promotion Code I I I I I I I I I I I I I I I I I I I |

To begin creating the ICR fields, click the ICR Tool in the Forms Designer toolbar.



In the example below, the mouse is placed at the top left-hand corner of the First Name field.



The mouse is dragged to the bottom right-hand corner of the First Name field to select the field.



Repeat these steps until all four fields have been highlighted as seen below:

| oforms Designer - NewFormSet.frs | • | _ 0 |
|---|---------------------------|-----|
| Edit Tools Help | | |
| 🖹 🔜 📭 🖌 🗋 | | |
| mSet | | _ |
| | First Name Middle Initial | |
| NewFormSet Survey form First Name | | |
| M.I. | Last Name | |
| Email Address | | |
| | Email Address | |
| | | |
| | | |

The ICR settings tab shows the default settings below.

For more information about the ICR field properties, please select Help > Contents in IQforms Designer.

When IQ forms processes the Customer Survey form, it will read the handwritten data in the configured fields and apply the defined ICR settings for recognition.

OMR

OMR (Optical Mark Recognition) is a technique for collecting information on a form where the user can mark response positions to indicate their answers to questions rather than having to write them out.

For example, a form may question sections with checkboxes or bubble fields as shown below.

| How long have you been a subscriber? | How often do you travel? |
|--------------------------------------|--------------------------|
| □ 1-4 years | Never |
| 5-8 years | Every Year |
| 9 or more years | Every two or more years |
| 9 or more years | Every two or more years |

If you received a Promotion Code, please fill in the numbers in the section below.



Select the OMR Tool from the Forms Designer toolbar.



Highlight the top left corner of the check box and drag the mouse to the bottom right corner to select the field.



If you received a Dramation Code Inlance fill

The field is added to the field list as shown below.

| FormSet | |
|--|------------------------|
| Surveys | 1-4 years |
| - He Last Name - He Email Address - Z Field 1 | □ 5-8 years |
| | 9 or more years |
| Settings: General ScanF & Xpress Dropout OMR Field Field 1 Field I Field Minimum Confidence: □ | If you received a Prom |

The Field name is changed to "1-4 Years" which is also an Attribute in ImageQuest. The Data Type for the ImageQuest Attribute is True/False, so if the field is selected on the form, the attribute will be checked as "True" in ImageQuest.

| Settings: | |
|---|--|
| General Scan Fix Xpress Dropout OMR Field 1-4 Years Field Minimum Confidence: | |
| □ Location & Size | |

The OMR ScanFix Xpress and Dropout tabs are very similar to same tabs for OCR and ICR.

The default settings for OMR tab are shown below.

| · | |
|----------|---|
| General | ScanFix Apress Dropola OWIN |
| | Analysis Compare Clip To Form Model |
| | Bubble Shape Rectangle 💌 |
| Marl | ced Bubble Threshold 25 🐳 |
| Unma | rked Segment Result |
| | |
| • | Single Checkbox Field C Multiple Checkbox Field |
| Single | Checkbox Field |
| | Method Use Area Without Adjustment |
| Mar | ked Checkbox Result 1 |
| | |
| Multiple | e Checkbox Field |
| | Marks Permitted Single Mark Allowed |
| Mu | Itiple Marks Delimiter , |
| Unmar | ked Bubble Threshold 8 🚔 |
| | Orientation Horizontal Segments |
| | Segment Count |
| | Bubbles per Segment |
| Multi Se | ament Read Direction Top to bottom: Left to right |
| india oc | ginent neda Birection (Topto-bottoni, Lentoright |
| | |
Some of the additional options available under the OMR tab include:

Analysis Comparison Method - This value specifies if the FormFix OMR engine used by FormAssist performs image comparison processing. Requesting comparison will improve recognition and accuracy in most cases, at a moderate cost to speed.

Bubble Shape - This value specifies the geometric shape of the bubbles in the OMR field to be analyzed.

Marked Bubble Threshold - This value specifies a percentage between 0 and 100 that one or more bubbles in a field must exceed in normalized mark density before the field is considered to contain a marked bubble.

Unmarked Segment Result - This value specifies a result character value for a field's segment that was determined to have no bubbles marked.

Single Checkbox Field - Enables controls for configuring a field that will have a single segment with a single bubble location.

Below is an example of how multiple OMR would appear in the field list.

| FormSet | | |
|---|---|--|
| First Name | How long have you been a sub | scriber? How often do you travel? |
| Ernal Address | 🗖 1-4 years | |
| Vever Z Every Year Z Every two or more | 5-8 years | Every Year |
| Settings: | 9 or more years | Every two or more years |
| General ScanFix Xpress Dro Field Every two or more | | |
| Field Minimum Confidence | First Name M.i. Last Name Email Address 1-4 Years 5-8 Years 9 or more Never Every Year Every two or more | , please fill in the numbers in the section below. |
| <u> </u> | | |
| Settings: | | |
| General Sc Field Even Field Minimu Regular Exp ➡ Location ➡ Values | can Fix Xpress Dropout OMR y two or more um Confidence: 0 - pression: - n & Size 1432, 1411, 30, 35 | |

Multiple Checkbox Field

OMR can also allow multiple checkboxes to be used.

In the example below, there are multiple checkboxes in the field.

Highlight the top left corner of the field on the form and drag the mouse to the bottom right corner to select the entire field.

| | P | romot | ion C | ode | |
|---|---|-------|-------|-----|---|
| | | | | | |
| 1 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 |
| 3 | 0 | 0 | 0 | 0 | Ö |
| 4 | 0 | 0 | 0 | 0 | 0 |
| 5 | 0 | 0 | 0 | 0 | O |
| 6 | 0 | 0 | 0 | 0 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 |
| 9 | 0 | 0 | 0 | 0 | O |
| 0 | 0 | 0 | 0 | 0 | 0 |
| | | | | | 0 |

Click the OMR tab to configure the field. Select Multiple Checkbox Field to enable the Multiple Checkbox Field options.

| Settings: |
|---|
| |
| General ScanFix Xpress Dropodt OMR |
| Analysis Comparison Method |
| Bubble Shape Rectangle |
| Marked Bubble Threshold 25 |
| |
| |
| Single Checkbox Field Multiple Checkbox Field |
| Single Checkbox Field |
| Method Use Area Without Adjustment |
| Marked Checkbox Result 1 |
| -Multiple Checkbox Field |
| Marka Permitted Single Mark Allowed |
| Multiple Marke Delimiter |
| |
| |
| |
| Bubbles per Segment |
| Multi Segment Read Direction Tag to be better 1.00 to state |
| India Segment Read Direction Top-to-bottom; Left-to-right |
| |
| |
| |

Determine if the field allows single or multiple choice and select the appropriate option from the Marks Permitted.

Select the Segments Editor to open the OMR Segment Bubble Value Editor and configure IQforms to match the multiple checkbox field.

| Multiple Checkbox Field |
|---|
| Marks Permitted Multiple Marks Allowed 💌 |
| Multiple Marks Delimiter |
| Unmarked Bubble Threshold 8 🗧 |
| Orientation Vertical Segments |
| Segment Count 5 - Segments |
| Bubbles per Segment 10 Editor |
| Multi Segment Read Direction Top-to-bottom; Left-to-right 💌 |
| |
| |
| |

In the example below, the Segment Count (top columns) shows five segments and the Bubbles per Segment (rows going down) is set to 10. This configuration matches the checkboxes and bubble fields for the Promotion Code field.

| 🖥 OMR Segme | ent Bubble Value | e Editor | | | | |
|-------------|------------------|-----------|-----------|-----------|-----------|---------------|
| | Segment 1 | Segment 2 | Segment 3 | Segment 4 | Segment 5 | 7 |
| Bubble 1 | 1 | 1 | 1 | 1 | 1 | Copy Segment |
| Bubble 2 | 2 | 2 | 2 | 2 | 2 | |
| Bubble 3 | 3 | 3 | 3 | 3 | 3 | Paste Segment |
| Bubble 4 | 4 | 4 | 4 | 4 | 4 | |
| Bubble 5 | 5 | 5 | 5 | 5 | 5 | Fill Down |
| Bubble 6 | 6 | 6 | 6 | 6 | 6 | Fill Bight |
| Bubble 7 | 7 | 7 | 7 | 7 | 7 | - In rught |
| Bubble 8 | 8 | 8 | 8 | 8 | 8 | |
| Bubble 9 | 9 | 9 | 9 | 9 | 9 | |
| Bubble 10 | 10 | 10 | 10 | 10 | 10 | |
| | | | | | | |
| | | | | | | OK |
| | | | | | | |

You can change the values in Segment Editor to match the values of the actual field being read.

As shown below, Bubble 10 shows a value of "0" which matches the actual field value. Select "Fill Right" to copy the same value to the other 4 segments.

| 🛃 OMR Segme | nt Bubble Value | Editor | | | | <u>_ </u> |
|-------------|-----------------|-----------|-----------|-----------|-----------|--|
| | Segment 1 | Segment 2 | Segment 3 | Segment 4 | Segment 5 | 1 |
| Bubble 1 | 1 | 1 | 1 | 1 | 1 | Copy Segment |
| Bubble 2 | 2 | 2 | 2 | 2 | 2 | |
| Bubble 3 | 3 | 3 | 3 | 3 | 3 | Paste Segment |
| Bubble 4 | 4 | 4 | 4 | 4 | 4 | |
| Bubble 5 | 5 | 5 | 5 | 5 | 5 | Fill Down |
| Bubble 6 | 6 | 6 | 6 | 6 | 6 | |
| Bubble 7 | 7 | 7 | 7 | 7 | 7 | |
| Bubble 8 | 8 | 8 | 8 | 8 | 8 | |
| Bubble 9 | | 0 | 9 | 9 | 9 | - |
| / Bubble 10 | | 10 | 10 | 10 | 10 | |
| | \smile | | | | | |
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| | | | | | | ОК |
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| | | | | | | Cancel |
| | | | | | | |
| | | | | | | 1. |

| OMR Segmer | | | | | | |
|------------|-----------|-----------|-----------|-----------|-----------|---------------|
| | Segment 1 | Segment 2 | Segment 3 | Segment 4 | Segment 5 | 1 |
| Bubble 1 | 1 | 1 | 1 | 1 | 1 | Copy Segment |
| Bubble 2 | 2 | 2 | 2 | 2 | 2 | |
| Bubble 3 | 3 | 3 | 3 | 3 | 3 | Paste Segment |
| Bubble 4 | 4 | 4 | 4 | 4 | 4 | |
| Bubble 5 | 5 | 5 | 5 | 5 | 5 | Fill Down |
| Bubble 6 | 6 | 6 | 6 | 6 | 6 | Fill Right |
| Bubble 7 | 7 | 7 | 7 | 7 | 7 | |
| Bubble 8 | 8 | 8 | 8 | 8 | 8 | |
| Bubble 9 | 9 | 9 | 9 | 9 | 9 | |
| Bubble 10 | 0 | 0 | 0 | 0 | 0 | |
| | | | | | | |
| | | | | | | OK Cancel |

Below are the results of the changes made.

Click "OK" to close the OMR Segment Bubble Value Editor.

The settings for the highlighted fields are the defaults for the formatted field.

| lettings: |
|---|
| General ScanFix Xpress Dropout OMR |
| Analysis Comparison Method Compare Clip To Form Model |
| Marked Bubble Threshold 25 |
| Unmarked Segment Result |
| Single Checkbox Field Multiple Checkbox Field |
| Checkbox Recognition Method Use Area Without Adjustment |
| Marked Checkbox Result 1 |
| Multiple Checkbox Field |
| Marks Permitted Single Mark Allowed |
| Multiple Marks Delimiter |
| Unmarked Bubble Threshold 8 🛨 |
| Orientation Vertical Segments |
| Segment Count 5 🛨 Segments |
| Bubbles per Segment 10 🕂 Editor |
| Multi Segment Read Direction Top-to-bottom; Left-to-right 💌 |
| |
| |
| |



When the configuration is complete, IQforms Designer would look similar to the example below.

The example below shows a completed survey form image. This image will be used to test the Customer Survey form with Process Forms.

| Customer Survey | |
|--|--|
| First Name Middle Initial | |
| | |
| BOBCYAHOOLCOM | |
| How long have you been a subscriber? How often do you travel? 1-4 years Mever 5-8 years Every Year 12 or more years Every two or more years | |
| If you received a Promotion Code, please fill in the numbers in the section below. | |
| Promotion Code 1 | |
| Please fax your completed survey to (885) 232-1234 or email to surveyfun@informa.com | |
| | |

The next few pages show the results of the Process Form task.

Identification Statistics

| IQforms Designer - Process Forms | | | | | |
|---|------------|-----|------|------|------|
| | | _ | _ | _ | |
| Processing Identification Statistics Field Results Timing F | Results | | | | |
| Name | 0° 97 | 90° | 180° | 270° | |
| customer survey | 3/ | 0 | 3 | • | |
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| | | | | | |
| | | | | | |
| CurrentImage | | | | | |
| Filled Image 1 of 1: C:\Users\Administrator\Desktop\surve | ey_test.Tl | F | | | |
| | | | | | Exit |
| | | | | | |
| | | | | | |

See below and following pages for screenshots of the Field Results for each form field.

| 📅 IQforms Designer - Process Forms | | |
|--|--|-----|
| Processing Identification Statistics Field Results Processing Identification Statistics Field Results Customer an every Processing International Code Processing Identification Statistics Processing Identification Statistics Field Results Processing Identification Statistics Processing Identification Statistics Processing Identification Statistics Processing Identification Statistics Field Results Processing Identification Statistics Processing Identification Processing Ide | Its Timing Results | |
| CurrentImage Filled Image 1 of 1: C:\Users\Administrator\D | Text Line Field Type: GeneralText Confidence: 993 Rectangle: Left = 22, Top = 27, Width = 199, Height = 68 Text Line Results | Ext |

| 🔂 IQforms Designer - Process Forms | | |
|--|--|------|
| Processing Identification Statistics Field Resi Customer survey Fine Name Final Name Final Address 1:4 Years 3:8 Years 3:9 Years 3:9 ronce Never Vever Year Every two or more Promotional Code | tite Trining Results | |
| CurrentImage Filed Image 1 of 1: C:\Users\Administrator\U | Text Line 1 Text Line 2 Text Line 2 Text Line 2 Text Line 3 Text Line 4 Text Line 5, Top = 20, Width = 54, Height = 66 2 Text Line Results 2 Text Line Results 2 Text Line Results | |
| | | Exit |

| 1 2 | Qforms Designer - Process Forms | | |
|-----|--|---------------------------|------|
| | Processing Identification Statistics Field R Customer survey First Name First Name First Name First Name First Name First Name First Name First Name First Name First Name First Name First Name First Name | esuits Timing Results | |
| | Current Image Filled Image 1 of 1: C:\Users\Administrato | r\Desktop\survey_test.TIF | Exit |



| P IQforms Designer - Process Forms | | |
|--|-------------------------|------|
| P Otorms Designer - Process Forms Processing Identification Statistics Field Resu Customer survey Customer survey Customer Brinal Address Customer Br | Its Timing Results | |
| CurrentImage Filled Image 1 of 1: C:\Users\Administrator\D | Desktop\survey_test.TIF | Exit |



| 2 | Qforms Designer - Process Forms | | |
|---|---|-------------------------|------|
| | Processing Identification Statistics Field Res Customer survey First Name Email Address 2 1-4 Years 2 Severy Year 2 Every Year 2 Every two or more Promotional Code | uts Tming Results | |
| | Current Image Filled Image 1 of 1: C:\Users\Administrator\ | Desktop\survey_test.TIF | Exit |

| uts Timing Results | |
|-------------------------|--------------------|
| Desktop\survey_test.TIF | Exit |
| | uts Timing Results |

| 🔁 IQforms Designer - Process Forms | | |
|--|---|------|
| Processing Identification Statistics Field Resul | Timing Results Image Results Image Results Image Results Field Name: Every Year Recognition Type: DMR Field Bounds: Laft=1422, Top = 1335, Width = 30, Height = 33 Results: Results: Results: Segment of Field Segments: 1 Segment 1 Accults Segment 2 Confidence: 98% Results: | |
| Current Image Filled Image 1 of 1: C:\Users\Administrator\D | esktop\survey_test.TIF | Exit |



| 1 IQtorms Designer - Process Forms | | |
|--|---|------|
| P Quorms Designer - Process Forms Processing Identification Statistics Field Result Control C | * Tming Results * *** * *** * *** * *** * *** * *** * *** * *** * *** **** ***** ************************************ | |
| Current Image Filled Image 1 of 1: C:\Users\Administrator\De | esktop\survey_test.TIF | Exit |

Once testing is complete, the Surveys Form Set can be added to the IQforms Configuration via the IQforms Console.

| 📁 IQforms | |
|--|--|
| i 🕨 🥝 🗽 🔀 | |
| Service Status = Bunning Edit Configuration | |

| IQ | IQforms Configuration | | | | | | | | | |
|----|-----------------------|-------|----------------------|--------------|----------------|---------|--|--|--|--|
| | Cabinet Name | Mode | FailureQueue | FolderPath | EnableNonForms | isValid | | | | |
| | ImageQuest | Forms | Administrator (User) | C: \AR Forms | Yes | Yes | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | 1 | | | | | |
| | | | | Delete | e Edit | New | | | | |



| Mode Properties | <u>k</u> |
|-----------------|--|
| Mode: | Forms |
| Cabinet Name: | ImageQuest 👻 |
| Failure Queue: | × |
| Folder Path: | |
| FormSet Path: | forma Software\ImageQuest\IQforms\Formsets\Surveys.frs |
| | Enable Nonforms |
| | |
| | |
| | |
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| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | Save Cancel |

| sabilite e ritalite | Mode | FailureQueue | FolderPath | EnableNonForms | isValid |
|---------------------|-------|----------------------|-----------------|----------------|---------|
| mageQuest | Forms | Administrator (User) | C:\AR Forms | Yes | Yes |
| mageQuest | Forms | Administrator (User) | C:\Survey Scans | Yes | Yes |
| | | | | | |
| | | | | | |
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| | | | | | |
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See below for an example of a Customer Survey form successfully processed by IQ forms and the results in IQ desktop.

IQforms Console.

| 8 | IQform | 15 | | | |
|-----|----------|----------|-------|-------------|---|
| : 0 | > 🖉 🖪 | 8 | | | |
| Se | ervice S | Status = | Runn: | ing | |
| 8, | /1/2013 | 4:17:06 | PM: | Information | Starting batch f6665374-ccd9-4337-8abb-f904074ff824 from file C:\IQforms Scans\survey_test.TIF. |
| 8, | /1/2013 | 4:17:07 | PM: | Information | Processing 1 forms. |
| 8, | /1/2013 | 4:17:07 | PM: | Information | Created 1 document(s) from form(s). |
| 8, | /1/2013 | 4:17:08 | PM: | Information | Saved 1 document(s) into IQ. |
| 8, | /1/2013 | 4:17:08 | PM: | Information | Processing complete for C:\IQforms Scans\survey test.TIF. |
| | | | | | |

Results in IQdesktop.

| DocumentType | First Name | M.I. | Last Name | Email Address | 1-4 Years | 5-8 Years | 9 or more | Never | Every Year | Every two or more | Promotional Code |
|-----------------|------------|------|-----------|---------------|-----------|-----------|-----------|-------|------------|-------------------|------------------|
| Customer Survey | BOB | J | NOLO | BOB@YAHOO.COM | | 8 | V | V | | 3 | 11222 |

The example below shows the status of a Customer Survey form that identified properly, but there was a recognition issue with one of more fields on the form.

| | 🧐 IQfor | ms | | | |
|---|----------|-------------------|-----|-----------------|--|
| | D 🖉 🛛 | x % | | | |
| Γ | 8/1/201: | 4:26:55 | PM: | Information | Starting batch 25a4e44d-eabd-4765-88a7-b0022fda1508 from file C:\IQforms Scans\survey_101.tif. |
| L | 8/1/201 | 4:26:57 | PM: | Information | Processing 1 forms. |
| | 8/1/2013 | 3 4:26:57 | PM: | Warning Form at | page 1 recognized as customer survey requires verification. |
| ľ | 8/1/201; | 3 4:26:57 | PM: | Information | Created 1 document(s) from form(s). |
| l | 8/1/2013 | 3 4:26:5 7 | PM: | Information | Saved 1 document(s) into IQ. |
| l | 8/1/2013 | 4:26:57 | PM: | Information | Processing complete for C:\IQforms Scans\survey_101.tif. |
| | | | | | |

This form will be added to the assigned User or Role Failure Queue (Indexing Queue) for review and correction.

In the example below, the batch is opened in Indexer and the Document Type is assigned correctly, but two fields, First Name and Last Name, need review.



A closer look at the image shows that the first boxed for the First Name and Last Name did not scan clearly. If the user can interpret the correct values, they can correct the data for each field and commit the document to ImageQuest.



NOTE: It is highly recommended to test any IQforms forms or barcode process before going live – Scan what you plan to scan for each FRS or barcode configuration and confirm you're getting the proper results. If you do not, please contact support for help.

Barcode Coverpages

IQforms is also designed to read barcodes from coverpages for scanning. Barcodes can be useful for reading data, such as Invoice Numbers, to then perform a lookup against an external source and populate that data into ImageQuest. (See the IQAdministrators Guide for further information on configuring lookups).

IQforms supports four types of barcode images: PDF417, Code 128, Code 39 and QRCode.

To enable barcode scanning in IQforms, select the Edit configuration icon in the IQforms Console to open the IQforms configuration screen:

| 📄 IQforms |
|--|
| i 🕨 🥝 🗽 🕵 |
| Service Statue = Running Edit Configuration |

Note that the previously configured forms configuration for Accounts Receivable is listed:

Click New.

| Qforms Configuration | | | | | | | | |
|----------------------|-------|----------------------|-------------|--------|----------------|---------|--|--|
| Cabinet Name | Mode | FailureQueue | FolderPath | | EnableNonForms | isValid | | |
| ImageQuest | Forms | Administrator (User) | C:\AR Forms | | Yes | Yes | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | Delete | Edit | New N | | |
| | | | | Delete | | Z | | |

From the Mode Properties dialog, select the dropdown for Mode and choose Barcode Coverpages.

| Mode Properties | × |
|-----------------|--------------------------|
| Mada | |
| Mode: | Forms I |
| Cabinet Name: | Barcode Coverpages |
| Failure Queue: | Checks M KeywordForms |
| Folder Path: | |
| FormSet Path: | |
| | Enable Nonforms |
| | |
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| | |
| | Save Cancel |

Note: The cabinet name will populate the first cabinet in alphabetical order that is configured on your ImageQuest Server. For example, if your ImageQuest cabinet was called Account Payable, that value would show in the cabinet name by default.

Select the User or Role for the Failure Queue. Any documents that fail to be read correctly will be sent to the ImageQuest Indexing Queue designated here.

| Mode Properties | × |
|--------------------------|--|
| Mode: | Barcode Coverpages |
| Cabinet Name: | ImageQuest 🔹 |
| Failure Queue: | |
| Folder Path: | Administrator (User) |
| FormSet Path: | iquser 2 (User) Final Approval (Role) Gl Coding (Role) |
| Coverpages: | |
| Name | Discard Needs Ociv Document Type |
| | |
| | Add |
| Attribute Lookup Setting | gs |
| Disable Key Field loo | kup |
| Overwrite recognize | d field values with lookup values |
| Fail form when looku | ip returns zero results |
| Fail form when looku | p returns more than one result |
| | Save Cancel |

Next, select the folder path where the barcode scans will be sent in order for IQ forms to process them.

| Note: The Barcode | e folder cannot | be located in the same | folder as a Forms folder. |
|-------------------|-----------------|------------------------|---------------------------|
|-------------------|-----------------|------------------------|---------------------------|

| Mode Properties | | | × |
|-----------------------|--------------------|---|------------|
| Mode: | Barcode | : Coverpages | • |
| Cabinet Name: | ImageQ | uest | • |
| Failure Queue: Admini | | trator (User) | • |
| Folder Path: | | | |
| FormSet Path: | В | rowse For Folder | |
| Coverpages: | | | |
| Name | | | |
| | | □ ▲ Local Disk (C:) ↓ AR Forms ↓ Barcode Coversheets ⊕ ↓ form ⊕ ↓ form ⊕ ↓ inetpub ↓ IQfolder ↓ Logs ⊕ ↓ PerfLogs ⊕ ↓ Program Files ⊕ ↓ Program Files (x86) | |
| Attribute Lookup Se | ttings I lookup | Make New Folder Of | Cancel |
| Overwrite recog | nized field va | lues with lookup values | |
| Fail form when lo | ookup return: | s zero results | |
| Fail form when lo | ookup return: | s more than one result | |
| | | s | ave Cancel |

Enable Nonforms: Selecting this checkbox will group documents that are scanned together and not defined as a form into one multi-page document. This can be useful when scanning forms that have attachments.

| Mode Properties | | | | × | |
|-------------------------|-------------------------|-------------|---------------|--------|--|
| Mode: | Barcode Coverpage | s | • | | |
| Cabinet Name: | ImageQuest | | | | |
| Failure Queue: | Administrator (User) | | | | |
| Folder Path: | C:\Barcode Coversheets | | | | |
| FormSet Path: | | | | | |
| Coverpages: | Enable Nonforms | 5 | | | |
| Name | Discard | Needs OCR | Document Type | | |
| | | | | | |
| , | | | | Add | |
| Attribute Lookup Settir | ngs | | | | |
| Disable Key Field lo | okup | | | | |
| Overwrite recogniz | ed field values with lo | okup values | | | |
| Fail form when look | up returns zero result | s | | | |
| Fail form when look | up returns more than | one result | | | |
| | | | Save | Cancel | |

Attribute Lookup Settings provides options for if and how IQforms will use an Attribute Lookup for a barcode coverpage.

| 1 | Disable Key Field lookup |
|----------|--|
| V | Overwrite recognized field values with lookup values |
| | Fail form when lookup returns zero results |
| | Fail form when lookup returns more than one result |

Disable Key Field lookup – Check this option if there is a Key Field lookup configured and you want IQforms to ignore that lookup.

Disable Key Field lookup has three associated options. All three options can be selected or each option can be selected individually.

| Attribute Lookup Settings | |
|--|---|
| Disable Key Field lookup | |
| Overwrite recognized field values with lookup values | 1 |
| Fail form when lookup returns zero results | |
| \square Fail form when lookup returns more than one result | |

Overwrite recognized field values with lookup values – IQforms reads the field data but will overwrite the field with the lookup data.

Fail form when lookup returns zero results – This option tells IQ forms to send the scanned document to the Failure Queue for manual indexing if there are no results returned from the lookup.

Fail form when lookup returns more than one result - This option tells IQ forms to send the scanned document to the Failure Queue for manual indexing if there are multiple results returned from the lookup.

Notice that by checking the "Disable Key Field lookup" option, the associated checkboxes are grayed out.

| Attribute Lookup Settings |
|--|
| Disable Key Field lookup |
| Overwrite recognized field values with lookup values |
| Fail form when lookup returns zero results |
| Fail form when lookup returns more than one result |

After the Mode Properties are configured, click "Add" to open the Coverpage Edit screen to configure the settings for the coverpage.

| Mode Properties | | | | | X | |
|--------------------|-------------|------------------------|--------------|---------------|--------|--|
| | _ | | | | | |
| Mode: | Bar | 3arcode Coverpages | | | | |
| Cabinet Name: | Ima | ImageQuest 👻 | | | | |
| Failure Queue: | Adm | Administrator (User) | | | | |
| Folder Path: | C:\[| C:\Barcode Coversheets | | | | |
| FormSet Path: | | | | | | |
| | | Enable Nonfor | ms | | | |
| Coverpages: | | | | | | |
| Name | | Discard | Needs OCR | Document Type | | |
| | | | | | | |
| | | | | (_ | Add | |
| Attribute Lookup S | ettings | | | | | |
| Disable Key Fiel | d lookup | | | | | |
| Overwrite reco | gnized fiel | ld values with l | ookup values | | | |
| Fail form when | lookup ret | turns zero resu | ilts | | | |
| Fail form when | lookup ret | turns more tha | n one result | | | |
| | | | | Save | Cancel | |

The Coverpage Edit dialog defines the main configuration for a barcode coversheet that will be processed by IQ forms using the following settings:

Name: The name of the coverpage. For example, "Invoice Coversheet".

Discard Coverpage: Checking this box will prevent the coverpage from being sent into ImageQuest. All pages behind the coverpage will be sent into ImageQuest.

Needs OCR: If checked, the coverpage and/or associated documents will be processed by OCR

Document Type: The ImageQuest Document Type that the scans will be indexed under.

Regex Capture Name: The name of the capture group to be used in the Regular Expression.

| Coverpage Edit | | | × |
|---------------------|-------------------|----------|-----|
| Name: | | | |
| | Discard coverpage | | |
| | Needs OCR | | |
| Document Type: | | | |
| Regex Capture Name: | | | |
| Barcodes: | | | |
| Attribute Name | Expression | | |
| | • | | |
| | | | |
| | | | |
| | | | |
| | | | |
| 1 | | New | |
| | | | |
| | | | |
| | | Save Can | cel |

The example below shows entries or selections for a New Employee Packet. The Regex Capture Name reflects what information is expected to be captured from the barcode.

Click "New" to open the Barcode Edit dialog.

| Coverpage Edit | | × |
|---------------------|---------------------|-------------|
| Name: | New Employee Packet | |
| | Discard coverpage | |
| | Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | |
| Barcodes: | | |
| Attribute Name | Expression | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | New |
| | | Save Cancel |

In the Barcode Edit dialog, enter the IQ Attribute Name that will be associated with the Barcode. Then, enter the Expression for that particular barcode.

An expression is a special text string for describing a search pattern or identifying patterns in text.

| Barcode Edit | | × |
|-----------------------------------|-------------|---|
| IQ Attribute Name: Expression: | | |
| | | |
| | Save Cancel | |

In the example below, "First Name" is entered for IQ Attribute Name and the Expression entered is (?<Capture>[^;]*);[^;]* which will parse the barcode string and capture the First Name value from a semicolon delimited string of values.

See page 115 for more information about Expressions and additional examples.

| Barcode Edit | 2 | × |
|--------------------|------------------------------------|---|
| | | |
| IQ Attribute Name: | First Name | |
| Expression: | (? <capture>[^;]*);[^;]*</capture> | |
| | | |
| | | |
| | Save Cancel | |
| | | |

Click "Save" to save the barcode definition and return to the Coverpage Edit window.

In the example below, there is now a new barcode definition listed in the Barcode section for First Name that also displays the Expression that was configured.

| Coverpage Edit | | × |
|---------------------|------------------------------------|-------------|
| Name: | New Employee Packet | _ |
| | Discard coverpage | |
| | Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | - |
| Parcadas | | |
| Barcodes: | [Francesian | |
| First Name | (2 <canture>[^:]*):[^:]*</canture> | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | New |
| | | |
| | | Save Cancel |

Barcode definitions can edited or deleted as needed. To edit or delete a barcode definition, right-click on the definition and select Edit or Delete.

| Coverpage Edit | | × |
|---------------------|------------------------------------|---|
| Name: | New Employee Packet | |
| | Discard coverpage | |
| | ✓ Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | |
| | | |
| Barcodes: | | |
| Attribute Name | Expression | |
| First Name | (? <capture>[^;]*);[^;]*</capture> | |
| | New | |
| | Save Cancel | |

Edit will open the Barcode Edit dialog.

Delete will prompt the user to confirm they want to delete the selected barcode definition.

| Confirm D | elete | × |
|-----------|--|---|
| ? | Are you sure you want to delete the selected barcode definition? | |
| | Yes No Cancel | |

Click "Save" in the Coverpage Edit dialog to return to the Mode Properties dialog.

In the example below, there is a new coverpage configuration entry in the Coverpages section that reflects the New Employee Packet that was configured in the Coverpage Edit dialog.

| Mode Properties | | | | × |
|--------------------------|------------------------|--------------|---------------------|--------|
| Mode: | Barcode Coverpa | ies | _ | |
| Cabinet Name: ImageQuest | | | | |
| Failure Queue: | Administrator () Ise | er) | • | |
| Folder Daths | | -17 | | |
| Polder Paul: | C. parcoue covers | sneets | | |
| FormSet Path: | | | | |
| Coverpages: | M Enable Nonforr | ms | | |
| Name | Discard | Needs OCR | Document Type | |
| New Employee Packet | : No | Yes | New Employee Packet | |
| | | | | |
| , | | | A | \dd |
| Attribute Lookup Settir | ngs | | | |
| Disable Key Field lo | okup | | | |
| Overwrite recogniz | ed field values with l | ookup values | | |
| Fail form when look | up returns zero resu | ilts | | |
| Fail form when look | up returns more tha | n one result | | |
| | | | Save | Cancel |

Coverpage configurations can edited or deleted as needed. To edit or delete a coverpage configuration, right-click on the configuration and select Edit or Delete.

| Mode Properties | | × |
|---------------------|--|---|
| Mode: | Barcode Coverpages | |
| Cabinet Name: | ImageQuest 👻 | |
| Failure Queue: | Administrator (User) | |
| Folder Path: | C:\Barcode Coversheets | |
| FormSet Path: | | |
| Coverpages: | Enable Nonforms | |
| Name | Discard Needs OCR Document Type | 1 |
| | Delete | |
| | Add | |
| Attribute Lookup Se | ettings | |
| Disable Key Fiel | d lookup | |
| Overwrite recog | gnized field values with lookup values | |
| Fail form when I | lookup returns zero results | |
| Fail form when I | lookup returns more than one result | |
| | Save Cancel | |

Edit will open the Coverpage Edit dialog.

Delete will prompt the user to confirm they want to delete the selected coverpage configuration.



Click "Save" to save the Barcode Coverpage configuration.

| Mo | de Properties | | | | | X |
|--|-------------------------|------------|------------------|------------|-------------------|--------|
| 1 | Mode: | Barc | ode Coverpao | es | T | |
| , | Cabinet Name: | Imac | aQuest | | | |
| | abinet Name: | Imag | jequest | | • | |
| F | Failure Queue: | Adm | inistrator (User | .) | • | |
| F | Folder Path: | C:\B | arcode Covers | heets | | |
| F | FormSet Path: | | | | | |
| | | ⊡ E | nable Nonform | IS | | |
| | Coverpages: | | | | | |
| | Name | | Discard | Needs OCR | Document Type | |
| | New Employee Packet | | No | Yes | New Employee Pack | et |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | 1 | | | | | |
| | | | | | _ | Add |
| | Attribute Lookup Settin | gs | | | | |
| | Disable Key Field loo | okup | | | | |
| Overwrite recognized field values with lookup values | | | | | | |
| | Fail form when look | up reti | urns zero resul | ts | | |
| | Fail form when look | up ret | urns more thar | one result | | |
| | | | | | Save | Cancel |

In the example below, the new Coverpages configuration is listed in IQforms Configuration and now the New Employee Packet can now be processed by IQforms.

| forms Configura | ation | | | | | | > |
|-----------------|------------|----------------------|------------------------|----------|----------------|---------|---|
| Cabinet Name | Mode | FailureQueue | FolderPath | | EnableNonForms | isValid | |
| ImageQuest | Forms | Administrator (User) | C: AR Forms | | Yes | Yes | |
| ImageQuest | Coverpages | Administrator (User) | C:\Barcode Coversheets | | No | Yes | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | ĸ |
| | | | | | | | h |
| | | | | Delete | Edit | New | |
| | | | | Deletern | | - ACMII | |

Click the **X** to close the IQforms Configuration.

When IQforms processes a barcode coverpage, it will read the barcode(s) and populate the associated attribute(s) with the barcode data and import the coverpage and/or attached documents as the Document Type that was assigned in the coverpage configuration.

A Barcode Coverpage configuration can have multiple coverpages and barcode definitions.

In the example below, a new barcode definition will be added to the New Employee Packet.

First, Edit is selected on the New Employee Packet coverpage configuration to open the Coverpage Edit dialog.

| Mode Properties | | × |
|----------------------|--------------------------------------|---|
| Mode: | Barcode Coverpages | |
| Cabinet Name: | ImageQuest 🔹 | |
| Failure Queue: | Administrator (User) | |
| Folder Path: | C:\Barcode Coversheets | |
| FormSet Path: | | |
| | Enable Nonforms | |
| Coverpages: | | |
| Name | Discard Needs OCR Document Type | |
| | Delete | |
| | Add | |
| Attribute Lookup Set | tings | |
| Disable Key Field | lookup | |
| Cverwrite recogr | ized field values with lookup values | |
| Fail form when lo | okup returns zero results | |
| Fail form when lo | okup returns more than one result | |
| | Save Cancel | |
Click "New" to open the barcode Edit dialog.

| Coverpage Edit | | × |
|---------------------|------------------------------------|-------------|
| Name: | New Employee Packet | |
| | Discard coverpage | |
| | Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | |
| | , | |
| Barcodes: | | |
| Attribute Name | Expression | |
| First Name | (? <capture>[^;]*);[^;]*</capture> | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | New |
| | | Save Careel |
| | | Cancel |

In the example below, "Last Name" is entered for IQ Attribute Name and the Expression entered is [^;]*;(?<Capture>[^;]*);[^;]*[^;]* which will parse the barcode string and capture the Last Name value from a semicolon delimited barcode string.

Click "Save" to save the barcode definition and return to the Coverpage Edit window.

| Barcode Edit | | × |
|--------------------|---|---|
| | | |
| IQ Attribute Name: | Last Name | |
| Expression: | [^;]*;(? <capture>[^;]*);[^;]*[^;]*</capture> | |
| | | |
| | | |
| | Save Cancel | 1 |
| | | |

In the example below, there are now two barcode definitions listed in the Barcode section, one for First Name and the newly added definition for Last Name.

| Coverpage Edit | | X |
|---------------------|---|--------------|
| Name: | New Employee Packet | |
| | Discard coverpage | |
| | ✓ Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | |
| Providence | | |
| Barcodes: | [- | |
| Attribute Name | Expression | |
| Last Name | (/ <capture>[^;]*);[^;]* [^;]*;(?<capture>[^;]*);[^;]*[^;]*</capture></capture> | |
| - | | |
| | | |
| | | |
| | | |
| | | |
| | | New |
| | | |
| | | Same L Carat |
| | | Save Cancel |

Each new barcode definition that is added will be listed in the Barcodes section. In the example below, a third definition for Date of Birth has been added and is displayed in the Barcodes section.

| Coverpage Edit | | × |
|--|--|-------------|
| Name: | New Employee Packet | |
| | Discard coverpage | |
| | Needs OCR | |
| Document Type: | New Employee Packet | |
| Regex Capture Name: | Capture | |
| Barcodes: | | |
| Attribute Name | Expression | |
| First Name Last Name Date of Birth | (? <capture>[^;]*);[^;]* [^;]*;(?<capture>[^;]*);[^;]*[^;]* [^;]*;[^;]*;(?<capture>[^;]*)[^;]*</capture></capture></capture> | |
| | | |
| | | |
| | | |
| | | New |
| | | Save Cancel |

Click "Save" to save the Coverpage Edit and return to the Mode Properties dialog.

Click "Save" to return

| Mode Properties | | | | | × |
|-------------------------|---------|------------------|-------------|---------------|--------|
| Mode: | Barc | ode Coverpag | es | ~ | |
| Cabinet Name: | Imag | jeQuest | | - | |
| Failure Queue: | Adm | inistrator (User | r) | - | |
| Folder Path: | C:\B | arcode Covers | heets | | |
| FormSet Path: | | | | | |
| | Г e | nable Nonform | IS | | |
| Coverpages: | | | | | |
| Name | | Discard | Needs OCR | Document Type | |
| | | | | | |
| | | | | | Add |
| Attribute Lookup Settin | gs | | | | |
| Disable Key Field loo | kup | | | | |
| Overwrite recognize | d field | d values with lo | okup values | | |
| Fail form when look. | ip reti | urns zero resul | ts | | |
| Fail form when look | ıp reti | urns more than | one result | | |
| | | | | Save | Cancel |

Click the ${\bf X}$ to close the IQ forms Configuration.

| orms Configura | tion | | | | | | > |
|----------------|------------|----------------------|------------------------|--------|----------------|---------|-----|
| Cabinet Name | Mode | FailureQueue | FolderPath | | EnableNonForms | isValid | |
| ImageQuest | Forms | Administrator (User) | C: AR Forms | | Yes | Yes | |
| ImageQuest | Coverpages | Administrator (User) | C:\Barcode Coversheets | | No | Yes | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | - R |
| | | | | Delete | E dit | New | |
| | | | | Delete | Eult | New | • |

The New Employee Packet can now be processed by IQforms.

The example below shows a New Employee Packet coversheet and associated pages: a copy of a resume, W-4 and a Driver's License and Social Security Card. The barcode on the coversheet contains the data for the following: First Name, Last Name and Date of Birth.

When IQ forms processes this document, it will parse the barcode and capture the data for First Name, Last Name and Date of Birth and add the document to ImageQuest as a four page New Employee Packet and populate the First Name, Last Name and Date of Birth fields with the barcode data.



The New Employee Packet is scanned to C:\Barcode Coversheets. The example below shows the progress in the IQ forms Console.

| 🧯 IQforms | | - | . 🗆 🗵 |
|-----------------------|-------------|--|-------|
| i 🕨 🥝 🗽 🛠 | | | |
| 5/21/2014 3:33:38 PM: | Information | Starting batch e5fa0866-3879-441c-a9e5-96fb9225dca5 from file C:\Barcode Coversheets\New Employee Packet s | can 🔺 |
| 5/21/2014 3:33:41 PM: | Information | Processing 1 forms. | |
| 5/21/2014 3:33:41 PM: | Information | Created 1 document(s) from form(s). | |
| 5/21/2014 3:33:41 PM: | Information | Saved 1 document(s) into IQ. | |
| 5/21/2014 3:33:41 PM: | Information | Processing complete for C:\Barcode Coversheets\New Employee Packet scan.pdf. | |
| | | | |
| | | | |

The example below shows the results in IQdesktop.



All IQ forms exceptions will be added to the Failure Queue that was configured in the Form Set.

NOTE: It is highly recommended to test any IQforms forms or barcode process before going live – Scan what you plan to scan for each FRS or barcode configuration and confirm you're getting the proper results. If you do not, please contact support for help.

Below are some examples of how to configure an Expression:

Example 1:

The following Expression will capture a barcode that contains a 10 digit number:

(?<Capture>^[0-9]{10})

Breakdown:

- Regex to capture 10 digits ^[0-9]{10}
- ?<Capture> Capture everything after this statement
- Enclose the capture group in parenthesis before the question mark and after the regex statement

Example 2:

The following Expression will capture a barcode that contains a 10 digit number in between a static INF prefix and a suffix of a dash followed by 4 alpha characters:

Example string: INF01234-ARIZ

```
INF(?<Capture>[0-9]{5})-\w{4}
```

Breakdown:

- Regex to capture the literal value INF
- ?<Capture> Capture everything after this statement
- Regex to capture 10 digits [0-9]{5}
- Enclose the capture group in parenthesis before the question mark and after the regex statement
- Hyphen character captures the dash
- Regex to capture the last 4 characters /w{4}

For more information on Regular Expressions, see the website below:

http://www.regexlib.com

Check Recognition

IQforms is also designed to work with A2iA to perform check recognition. To enable check recognition in IQforms, select the Edit configuration icon in the IQforms window to open the IQforms configuration screen.

| 🔁 IQforms | |
|--|-----|
| | |
| Service Status Running Edit Configuration | * |
| | |
| | |
| | |
| | |
| | |
| • | |
| Ready. | .:: |

Select New:

| forms Configura | ation | | | | — × |
|--------------------------|---------------|--------------------------------|------------------------|-------------|--------------|
| Cabinet Name | Mode | FailureQueue | FolderPath | EnableNonF | orms isValid |
| ImageQuest ImageQuest | Forms Cove | Erick Kiggen/ Administrator | C: \Anderson C: \CP | Yes Yes | Yes Yes |
| | | | | Delete Edit | New |

From the Mode Properties screen select the dropdown for Mode and choose Checks:

| Mode Properties | |
|-----------------|-----------------------------|
| Mode: | Forms 🔻 |
| Cabinet Name: | Forms Barcode Coverpages |
| Failure Queue: | Checks |
| Folder Path: | |
| FormSet Path: | |
| | Enable Nonforms |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | Save Cancel |

As with prior configurations (Forms & Coverpages), the cabinet that is listed first will populate in the Cabinet name field:

| Mo | de Properties | |
|----|------------------------|--|
| | Mode: | Checks 🔹 |
| | Cabinet Name: | ImageQuest 🔹 |
| | Failure Queue: | - |
| | Folder Path: | |
| | FormSet Path: | |
| | | Enable Nonforms |
| | Params Path: | |
| | Doc Table Path: | |
| | Dongle Server Address: | |
| | Document Type: | |
| | Nonform Threshold: | 70 |
| | Engine Timeout: | 10000 (milliseconds) |
| | Image DPI: | (default = 200) |
| | | Enable Auto-Deskew Autocorrect Orientation |
| | | Needs OCR |
| | | Disable Key Field lookup |
| | | V Overwrite recognized field values with lookup values |
| | | ✓ Fail form when lookup returns zero results |
| | | Fail form when lookup returns more than one result |
| | | Save Cancel |

Select the user or Role for the Failure queue. Any documents that fail to be read correctly will be sent here.

| Mode Properties | |
|------------------------|--|
| Mode: | Checks 👻 |
| Cabinet Name: | ImageQuest 🔹 |
| Failure Queue: | • |
| Folder Path: | Administrator (User) Erick Kiagen/ekiagen (User) |
| FormSet Path: | Role1 (Role) |
| Params Path: | |
| Doc Table Path: | |
| Dongle Server Address: | |
| Document Type: | |
| Nonform Threshold: | 70 |
| Engine Timeout: | 10000 (milliseconds) |
| Image DPI: | (default = 200) |
| | Enable Auto-Deskew |
| | Needs OCR |
| | Disable Key Field lookup |
| | Overwrite recognized field values with lookup values |
| | Fail form when lookup returns zero results |
| | Fail form when lookup returns more than one result |
| | Save Cancel |

Next, select the folder path where the checks will be sent in order for IQForms to process them. The folder path must be unique.

Select the checkbox for "Enable Nonforms" if other scans in addition to checks will be scanned along with checks.

| Mode Properties | |
|------------------------|--|
| Mode: | Checks |
| Cabinet Name: | ImageQuest 👻 |
| Failure Queue: | Erick Kiggen/ekiggen (User) 🔻 |
| Folder Path: | C:\Checks |
| FormSet Path: | |
| | Enable Nonforms |
| Params Path: | |
| Doc Table Path: | |
| Dongle Server Address: | |
| Document Type: | |
| Nonform Threshold: | 70 |
| Engine Timeout: | 10000 (milliseconds) |
| Image DPI: | (default = 200) |
| | Enable Auto-Deskew Autocorrect Orientation |
| | Needs OCR |
| | Disable Key Field lookup |
| | Overwrite recognized field values with lookup values |
| | Fail form when lookup returns zero results |
| | Fail form when lookup returns more than one result |
| | Save Cancel |

Note: For the following section of the Checks configuration, A2IA Checkreader must be installed on the server that is hosting the IQforms service.

A2iA requirements

- USB Port
- USB Dongle (Can be installed on a different computer)
- Refer to A2iA documentation for more information

Select the Params Path for A2IA:

C:\Program Files\A2iA\A2iA CheckReader V4.4 R2\Parms\Int\Parms

Next, select the Doc Table path for A2IA:

C:\Program Files\A2iA\A2iA CheckReader V4.4 R2\Data\Checks\CFUS_AMT\US_AMT.tbl

| Open | | Ne . | - | | - |
|----------|--|-----------------------|-----------------------|------------|--------------------|
| \odot | ↓ Computer ↓ Local Disk (C:) ↓ Program | n Files ► A2iA ► A2iA | A CheckReader V4.4 R2 | ► Data ► C | hecks ► CFUS_AMT ► |
| Organize | New folder | | | | |
| ^ | Name | Date modified | Туре | Size | |
| 1 | 🐌 Images | 3/12/2013 2:41 PM | File folder | | |
| | 퉬 Internal | 4/2/2013 3:36 PM | File folder | | |
| | US_AMT.tbl | 4/2/2013 3:36 PM | TBL File | 1 KB | |
| = | | | | | |
| | | | | | |

| Mode: | Checks 👻 | | | |
|------------------------|--|----------|--|--|
| Cabinet Name: | ImageQuest 🔹 | | | |
| Failure Queue: | Erick Kiggen/ekiggen (User) | | | |
| Folder Path: | C:\Checks | | | |
| FormSet Path: | | | | |
| | C Enable Nonforms | | | |
| Params Path: | C:\Program Files\A2iA\A2iA CheckReader V4.4 R2\F | arms\Int | | |
| Doc Table Path: | C:\Program Files\A2iA\A2iA CheckReader V4.4R2\Data\Che | | | |
| Dongle Server Address: | 192.168.100.25 | | | |
| Document Type: | check | | | |
| Nonform Threshold: | 70 | | | |
| Engine Timeout: | 10000 (milliseconds) | | | |
| Image DPI: | 200 (default = 200) | | | |
| | ☑ Enable Auto-Deskew ☑ Autocorrect Orienta | ation | | |
| | Veeds OCR | | | |
| | 🔽 Disable Key Field lookup | | | |
| | \fbox Overwrite recognized field values with lookup values | | | |
| | Fail form when lookup returns zero results | | | |
| | ☑ Fail form when lookup returns more than one res | ult | | |

Enter the Dongle Server Address and Document Type.

Note: The Document Type must already exist in ImageQuest and must be set to Check.

Note: the attributes that are captured are PayerName, CheckNumber, Date, MICR and Amount. These values are hardcoded and cannot be changed.

Nonform Threshold defaults to 70. Anything above this threshold will recognize as a Check.

Engine Timeout refers to how long A2iA will attempt to process the document before it fails it. The default is 10000 milliseconds.

Image DPI is set to 200 by default.

Note: The DPI setting MUST match the scanner setting or recognition will fail.

Click Save. The IQ forms Configuration screen should look similar to this:

| Cabinet Name | Mode | FailureQueue | FolderPath | EnableNonForms |
|--------------|--------|-----------------------------|-------------|----------------|
| ImageQuest | Forms | Erick Kiggen/ekiggen (User) | C:\Anderson | Yes |
| ImageQuest | Cove | Administrator (User) | C:\CP | Yes |
| ImageQuest | Checks | Erick Kiggen/ekiggen (User) | C:\Checks | Yes |
| | | | | |
| • | | III | | • |

Below is an example of a check that failed to read correctly because the confidence level on the CheckNumber and Date fields was too low. The user needs to index this check manually and verify the data is correct prior to committing the scan into ImageQuest.

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| the base has | | ACTAMONTE SPHENGS, PL 32/01 | 1 1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 |
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When a check is successfully processed by IQforms, it is added to ImageQuest with associated check data as seen in the example below.

| 👶 IQdesktop - ImageQuest | | | Contraction of the local division of the loc | | | | | . Annual | ing Marrison in A street |
|---|---|-------------|--|--------------|--------------|-----------|-------------|----------|--------------------------|
| <u>File Edit View D</u> ocument <u>T</u> ools | T <u>a</u> bs <u>H</u> elp | | | | | | | | |
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| Tasks 4 🗙 | 🛐 Indexing Que | ue 🖾 🌈 | Search 🔀 | | | | - | | |
| 🖍 Search 🌼 | 🖸 🖬 🖵 🛛 | 586 | 🖂 📓 🔀 🤌 🛙 | Grid Edit | | | | | |
| Keywords: | DocumentType | IN ('Check' |) AND (CreateDateTi | me = '8/23/2 | 2013') | | | | |
| 5 | Drag a column header here to group by that column | | | | | | | | |
| CreateDateTime | × 🖬 🕯 | 7 🗉 | CreateDateTime | PageCount | DocumentType | PayerName | CheckNumber | Date | Amount |
| DocumentType | | Z 🛛 🌺 | 8/23/2013 5:06:29 PM | | 1 Check | ZYTEK | 1816 | 4/8/2013 | 200.00 |
| 4 ج | | | | | | | | | |
| Customize Advanced Search | | | | | | | | | |

NOTE: It is highly recommended to test any IQforms forms or barcode process before going live – Scan what you plan to scan for each FRS or barcode configuration and confirm you're getting the proper results. If you do not, please contact support for help.

Upgrading IQforms

Before upgrading IQforms, we strongly recommend you backup your existing IQforms application files and all IQforms FRS files and associated FormAssist folders.

If upgrading IQforms from version 11.2.1 or higher, the upgrade process is very simple. Run 15.7 designer.msi and service.msi to upgrade both the IQforms designer and the service. Nothing more needs to be done.

If upgrading IQ forms from a version earlier than 11.2.1, the upgrade steps are as follows:

- 1. Make a backup of the existing IQ forms application files (especially the Configuration XML file) and any FormAssist folders and FRS files.
- 2. Run the IQforms 15.7 Service.msi
- 3. In the newly created IQforms\Service folder, replace the new 11.3 Configuration XML with the Configuration XML that was backed up in Step 1
- 4. Run the IQforms 15.7 Designer.msi
- 5. Open IQforms 15.7 Designer
- 6. Open all FRS files and setup all the Document Types and attributes
- 7. Verify the IQ forms Document Types and Attribute are mapped correctly in ImageQuest
- 8. Add each FRS in the IQforms Configuration

Logfiles

The IQforms Service logfiles are located on the PC that IQforms is installed on in the User's Temp directory for the user that is running the IQforms service. The logfiles are used for troubleshooting purposes to give the user or Informa Engineer more details if an error occurs. In this example, they are located here:

%appdata%\Local\Temp\Informa Software\LogFiles\IQforms

| 🚱 🕞 🖉 🕌 🕨 Erick Kiggen 🕨 AppData 🔺 Local 🕨 Temp 🔺 Informa Software 🕨 LogFiles 🕨 IQforms | | | | | | | | |
|--|---|-------------------|---------------|-------|--|--|--|--|
| File Edit View Tools Help | | | | | | | | |
| Organize 👻 Include in library 👻 | Share with 🔻 🛛 Burn 🔹 New folder | | | | | | | |
| 22110FC1-C7A2-44 ^ | Name | Date modified | Туре | Size | | | | |
| Accusoft Adobe Citrix Citrix E CRX_75DAF8CB77(CRX_75DAF8CB77(cshell cshell Cr28691 | Informa.ImageQuest.IQForms.log | 5/10/2013 2:12 PM | Text Document | 7 KB | | | | |
| | Informa.ImageQuest.IQForms.log 20130430 | 4/30/2013 3:11 PM | File | 8 KB | | | | |
| | Informa.ImageQuest.IQForms.log 20130506 | 5/6/2013 5:07 PM | File | 11 KB | | | | |
| | Informa.ImageQuest.IQForms.log 20130507 | 5/7/2013 2:26 PM | File | 1 KB | | | | |
| | Informa.ImageQuest.IQForms.log 20130508 | 5/8/2013 3:44 PM | File | 5 KB | | | | |
| | Informa.ImageQuest.IQForms.log 20130509 | 5/9/2013 4:00 PM | File | 7 KB | | | | |
| \mu ct3297861 | | | | | | | | |
| DDMCache | | | | | | | | |
| 📔 div2783.tmp | | | | | | | | |

If the IQforms service is running as the Local System user, the log files will be located under %windir%\temp\Informa Software\LogFiles.

The IQ forms Designer also has its own logging capabilities. To enable the logging for IQ forms designer, launch the application and from the Tools menu select "Enable Component Debug Logging".



This log is saved in the default location.