

# Instructions for Converting Omniform® to Formdocs™

Formdocs Application Note Updated 05/29/2018

This document provides instructions for converting both an Omniform design file and an Omniform data file to the corresponding Formdocs file format so that you can use Formdocs for your form-filling solution going forward.

Note that if you do not want to carry over to Formdocs any saved information in your Omniform data files then you can ignore the section on **Converting Data Files**.

The following instructions assumes the reader has a working knowledge of Omniform.

In order to perform conversions you must have Formdocs *SCAN & FILL*, v10.0 or higher, installed on your computer.

Suggestion: If you have never before created a form template in Omniform Designer or Formdocs Designer, it is strongly suggested that you first invest 30 minutes in taking the Formdocs Designer Tutorial. On the **Help** menu of Formdocs Designer, click **Formdocs Tutorial** to launch the tutorial. At the completion of the tutorial you will have familiarity with the commands and tools necessary to complete and adjust the conversion of your Omniform form template to the Formdocs format. After you complete the tutorial you can resume reading this document.

## How to Convert an Omniform Form to a Formdocs Form Template

Formdocs *SCAN & FILL* Designer offers three (3) different methods for you to convert your Omniform design file (\*.ofm) to the Formdocs form template format (\*.fdt).

The reason for providing three methods is because the accuracy of the conversion process depends on the complexity of the Omniform being converted; some conversion methods work better than others for a given form.

For example, if after you try converting with method #1 you are not satisfied with the accuracy of the conversion, you can retry the conversion using method #2; if that doesn't produce satisfactory results then you can try method #3. Sometimes it is best to try all three methods and then choose to work with the resulting converted form that displays the best results.

Note that regardless of the conversion method(s) you use, the conversion will rarely be 100% accurate; there will likely be some form design elements (fill-able fields, lines, boxes, text) that are mis-interpreted, missed altogether, or mistakenly created. As a result, you can expect that you will need to manually make such corrections using the Formdocs Designer form-drawing tools to draw by hand any items that were missed, or not created correctly and, in some cases, you may need to simply delete an item. To make these post-conversion tasks easier to perform, Formdocs Designer provides a *Proofreader*, a guided step-by-step tool that focuses you on specific tasks, all of which are described later in this document.

To begin, choose the scenario which applies to you and then perform your choice of the available conversion options listed. Note that you can perform as many available conversion options as you want, to see which produces the best result.

### **"I Have Omniform Running on Windows XP..."**

***"and I have a PDF printer installed."***

Follow the instructions for Conversion Method #2.

***"and I have a hard-copy printer attached."***

Follow the instructions for Conversion Method #3.

### **"I Have Omniform Running on Windows VISTA, 7, 8, or higher..."**

***"and I have access to my Omniform \*.ofm files"***

Follow the instructions for Conversion Method #1.

***"and I have a PDF printer installed."***

Follow the instructions for Conversion Method #2.

***"and I have a hard-copy printer attached."***

Follow the instructions for Conversion Method #3.

### **"I Can No Longer Run Omniform on any computer... "**

***"and I have a blank copy of my original paper form."***

Follow the instructions for Conversion Method #3.

***"and I have saved copies of my Omniform \*.ofm files."***

Contact Formdocs for a professional services quote to have our staff convert your Omniform design file to a PDF document so that you can use Conversion Method #2.

## Conversion Method #1

You will print your Omniform to a Formdocs-provided print driver which will create converted output. You must have the "Print to Formdocs" print driver installed.

1. Install FormDocs *SCAN & FILL* on the same computer running Omniform.
2. Start Omniform Designer.
3. Open the Omniform design file (\*.ofm) you want to convert to Formdocs.
4. In Omniform designer, click *Print*.
5. In the Omniform 'Print' dialog box, open the list of available printers and select the printer named "**Print to Formdocs**".

(If you do not see the "Print to Formdocs" driver listed then you must close the Print dialog box and download the driver from [www.formdocs.com/support/](http://www.formdocs.com/support/) and install it. Then repeat starting at Step 4, above.)

6. Click **OK** to print. The Formdocs Designer will start up and the Formdocs Document Converter Wizard appears; click *Next*.
7. When the Document Conversion Wizard completes it will produce a Formdocs form template on the workspace. At this time do not be concerned with any conversion errors you may notice, you will address those later.
8. In Formdocs Designer, dismiss the conversion completion message, and then choose 'File/**Save**' to descriptively name and save the template file; if prompted by a dialog box for, "*Form template properties*", press **Skip**.
9. Leave open the original form in Omniform Designer so that you can refer back to it when necessary.
10. On the left side of the Formdocs Designer workspace appears the FormDocs *Proofreader*. Go to the section titled, **Proofreading the Converted Form** elsewhere in this document and follow those instructions.

- *end* -

## Conversion Method #2

You will print your Omniform to a PDF printer to create a PDF document file; you will then select that file as input to Formdocs Converter. You must have any third-party PDF printer installed.

1. Start Omniform Designer.
2. Open the Omniform design file (\*.ofm) you want to convert to Formdocs.
3. In the Omniform *Print* dialog box, open the list of available printers and select your PDF printer; choose to print **All Pages** and specify a descriptive file name for the PDF output file.
4. Click *OK* to print; verify the PDF output file is saved and note its folder location.
5. If necessary, copy the PDF document to the computer running Formdocs. Start Formdocs Designer; (if the *User Guide* appears, dismiss it.)
6. Choose the option to **Convert a Document**; the Formdocs Document Converter Wizard appears; when prompted to choose which you want to convert, select **PDF...** and then press *Next*.
7. Locate and select the PDF document you created and saved, then press *Open*.
8. In the Document Converter Wizard, press *Next* to perform the conversion process.
9. When the Document Conversion Wizard completes it will produce a Formdocs form template on the workspace. At this time do not be concerned with any conversion errors you may notice, you will address those later.
10. In Formdocs Designer, dismiss the conversion completion message, and then click **Save** to descriptively name and save the template file; if prompted by a dialog box for, "*Form template properties*", press **Skip**.
11. On the left side of the Formdocs Designer workspace appears the Formdocs *Proofreader*. Go to the section titled, **Proofreading the Converted Form** elsewhere in this document and follow those instructions.

- end -

## Conversion Method #3

You will scan a paper copy of your form into Formdocs Converter. You must have attached to your computer a WIA or TWAIN compliant scanner that can acquire a grayscale image.

1. Start Formdocs *Scan & Fill Designer*.
2. Place your paper form in the scanner. When using a flatbed scanner, butt the entire edge of the face-down paper squarely against the left edge of the flatbed, then align the edge of the paper to the correct paper-size tick-mark on the flatbed. Note that best results will be had when you take the time to carefully place and align the paper on the flatbed as described.
3. On the *Tools* menu, choose **Convert...** The Document Converter Wizard appears.
4. Choose **Paper document in my scanner**, and then click *Next*.
5. Note that if you already have a form template open on the workspace it will prompt you to choose whether the scan should result in adding a page to the existing form template or if it should create a new form template; make a choice and click *Next*.
6. Specify the correct paper size and orientation of the document you want to scan, then select where on the scanner you will place the paper document (Flatbed or Sheet-feeder). If your document contains any color logo, color illustrations, or colored text you want to keep, select the checkbox, **Contains Color**. Click *Next*.
7. Click *Next*. (Note that if you chose a *Custom* paper size then your scanner will prompt you for options; also, some scanners display their own user interface when you scan from FormDocs; choose a minimum of **300 DPI** (600 DPI if characters are very small) and **Grayscale** if your document has no color, otherwise choose **Color**, and then start scanning.)
8. Formdocs will begin scanning your document.
9. When scanning completes you will see the image of your scanned document appear on the workspace, and a Document Conversion Wizard will appear in a sidebar. Read the brief instructions at each step and use the controls to make any necessary adjustments to the image on your workspace. Visit each step by clicking *Next*.
10. When the Document Conversion Wizard completes it will produce a FormDocs form template on the workspace. At this time do not be concerned with any conversion errors you may notice, you will address those later.
11. Click **Save** and enter a descriptive file name for your form template.
12. On the left side of the Formdocs Designer workspace appears the Formdocs *Proofreader*. Go to the section titled, **Proofreading the Converted Form** elsewhere in this document and follow those instructions.

- end -

## Proofreading the Converted Form

The Formdocs conversion process does its best to convert your Omniform to a Formdocs form template. The result of that conversion (lines, fields, text, etc.) appears on the Formdocs Designer workspace. However, there is still work to be done as the conversion process does not carry over all of the properties and settings of your original Omniform.

Additionally, the conversion process is rarely 100% accurate; typically, the conversion process may miss, or misinterpret, some items.

As a result, you will need to use Formdocs commands and drawing-tools to make any corrections and enhancements to the form template.

To make these post-conversion tasks easier to perform, Formdocs provides a *Proofreader* feature which guides you step-by-step so that you can perform each task in a logical order.

It is suggested that you follow each Proofreader step starting with the first and then pressing the *Next Step* button at the end of each step. Note that you can also randomly go to any Proofreader step by clicking it in the list.

## Design

This is the default workspace view that lets you use all the form-drawing tools, menus, and commands to draw, manipulate and configure fields, text, lines, and graphics. The full functionality of FormDocs Designer is made available in this view.

Note that the conversion process is never 100% accurate and you will likely need to use this Design view and its form drawing tools to restore any missing fields or text, or use commands to move or re-size fields, re-format text, or delete extraneous fields or graphics.

### Design File Conversion Limitations

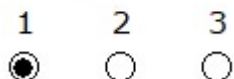
Some Omniform objects have no corresponding match in Formdocs so they will require special handling...

**Circle Text** – Formdocs does not provide a circle-text drawing tool however, an Omniform circle text field can be substituted with either a Formdocs option button or checkbox field with the label positioned adjacent to the field.

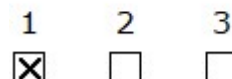
Omniform Circle Text:



Formdocs Option Button:



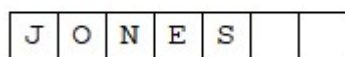
Formdocs Checkbox:



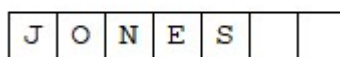
If you need to ensure only one choice is made, select all buttons or checkboxes, then on the *Arrange* menu choose *Group Options*.

**Comb** – Formdocs does not provide a comb-drawing tool however, the Formdocs Conversion process does dynamically create matching comb fields. Note that you will not be able to adjust the size or properties of comb fields.

Omniform Comb:



Formdocs Comb:



If the conversion mistakenly creates a comb when instead you want individual fields - right click the comb; in the drop-down menu, choose *Convert*; this will convert the Comb into individually named fields.

**Table** - Formdocs creates a different Table object than Omniform does; for example, in Formdocs an entire column is considered one named field even though it contains individual rows; in Omniform the same dimension Table is comprised solely of individual named fields, one for each row in every column.

FormDocs Table:

Field_01	Field_02	Field_03

Omniform Table:

Field_01	Field_02	Field_03
Field_04	Field_05	Field_06
Field_07	Field_08	Field_09
Field_10	Field_11	Field_12
Field_13	Field_14	Field_15

If you need to preserve the structure of the Omniform table in Formdocs - for example, because you later intend to import your Omniform records data file into Formdocs - right click the table; in the drop-down menu, choose *Convert To-> Text Field*; this will convert the Formdocs table into one that has all individually named fields just like it was in Omniform.



## Tab Order

The Formdocs conversion process does not copy-over the tabbing order from Omniform; instead, Formdocs creates a top-down, left to right order but you can change that back to the original Omniform tabbing order, or to any tabbing order you want.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Using the Proofreader"; under the topic, Workspace Views, read the section Tab Order View.

## Field Names

Both Formdocs and Omniform use *field names* to identify form fields (i.e. areas on the form into which users can enter information). This proofreading step displays the field names created for each field on the form.

In your Omniform you may have field names that are *descriptive*, such as "CustomerName", or you may have non-descriptive default field names that Omniform Designer generated, such as "Field001", or you may have a mix of both types.

The Formdocs conversion process does not copy-over field names from Omniform; instead, Formdocs tries to create a *descriptive* field name based on what the field is supposed to contain. For example, if a form field is labeled "Customer Name", Formdocs will likely name that field *CustomerName*. You can choose to accept the Formdocs-generated field name, or you can change it back to the original Omniform field name, or you can create a different field name.

Note that it is beneficial to have *descriptive* field names and, unless you have a good reason not to, it is best to assign descriptive field names to your Formdocs fields with the *same* name as the corresponding fields in the Omniform – but only if those names are *descriptive*.

To learn the name of an Omniform field, in Omniform, right-click the field and choose **Object Definition**; view box titled, *Name*. Using the same descriptive name is especially important if you intend to later create field calculations, or import legacy Omniform records into your corresponding Formdocs template to create a Formdocs forms database that mirrors your legacy Omniform forms database.

If you have Omniform fields with non-descriptive default field names it is helpful to print out that form page and hand-write in those form field names so that you can reference them as you re-name your Formdocs fields with more descriptive names; then you will later use that hand-written information as a reference to create the field name linkages during the Formdocs Filler data import process by selecting field names that display in a dialog box. For example, during the Formdocs Filler data import process you might need to link a non-descriptive Omniform default name like, "FillText1" to the more descriptive name, "CustomerName" in the Formdocs template.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Using the Proofreader"; under the topic, Workspace Views, read the section Field Names View.

## Data Entry Format

The Formdocs conversion process does not copy-over the data-entry format of form fields from Omniform; instead, Formdocs creates a data-entry format based on the meaning of the field label, if one is present.

For example, if a form field is preceded by a text label that is, "DOB" (Date of Birth), then Formdocs conversion will give that field a data-entry type of *Date*; that is, users will only be allowed to enter a date value in that field and when the form is saved, the value in that field will be stored as a date.

Unless you have a good reason not to, it is best to assign Data Entry Types for your Formdocs fields with the *same* Data Entry Type as the corresponding fields in the Omniform. To learn the Data Entry Type of an Omniform field, in Omniform, right-click the field and choose **Object Definition**; view boxes titled, *Type* and *Format*. This is especially important if you intend to later create field calculations, or import legacy Omniform records into your corresponding Formdocs template to create a Formdocs forms database.

Note that if fields will be involved in a numerical calculation expression then you should assign those fields one of Formdocs' available numeric data entry types, as appropriate; for example, *Currency*, *Number*, *Percentage*.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Using the Proofreader"; under the topic, *Workspace Views*, read the section *Data Entry View*.

## Calculations

The Formdocs conversion process does not copy-over any calculation expressions from Omniform. You will need to re-create in Formdocs any calculations that are present in your Omniform fields.

To learn whether an Omniform field has a calculated value, in Omniform, click the Omniform field; any calculation expression will appear in the Omniform Designer *Calculation Toolbar*. Make note of any field names, operands, and operators in the calculation expression and create the same expression for the corresponding FormDocs field.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Calculations" and read the topics, starting with "Create a Calculation".

## Automation

Omniform has no Forms Automation feature so there is nothing to convert or carry-over; this Proofreading step can be skipped over.

You can learn later about how to use the Forms Automation feature to enhance your Formdocs form in ways that were not possible in Omniform.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Advanced Features" and read the topics, starting with "Programming Information".

## Finish

At this step you have the option to bring your converted form template into Formdocs Filler to try filling it in. Or, if your converted form template has more than one page, you can switch to the next page and start Proofreading again on that page. Note that all pages in a form template need to be proofread.

For more information, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Working with Pages" and read the topics, starting with "Go to a Page".

At any time you can see what it's like to enter data into the fields of your form template by pressing the toolbar button **Preview in Filler**; this will switch you to Formdocs Filler and open your form template so that you can tab-around, fill-in and save information.

To resume working on the design of your form template, in Formdocs Filler press the toolbar button titled, **Design**; doing so will close Formdocs Filler and switch you back to Formdocs Designer.

You can repeat the cycle of proofreading, correcting, and adjusting your form template in Formdocs Designer and then previewing your form template in Formdocs Filler for as many times as you want to.

For more information on the Design and Preview cycle, see the Formdocs Designer User Guide, available on the Help menu; open the chapter, "Form Design Basics" and read the topic, "The Design-Preview Cycle".

For more detailed information on the Finish view, open the chapter, "Using the Proofreader"; under the topic, Workspace Views, read the section Finish View.

This ends the section on converting an Omniform design file to a Formdocs form template. You can now open your new template using Formdocs Filler; on the Windows **Start** menu, choose *Formdocs Filler*; on the Formdocs Filler *File* menu, choose **New** and select your template by name.

Similar to Omniform, the Formdocs Filler toolbar has commands which enable you to fill-in and save completed forms to a forms database. There are also commands to browse, navigate, search for, sort, and *list* database records. To learn more about working with a forms database, see the Formdocs Filler User Guide, available on the Help menu; open the chapter, "Forms Database Operations" and read the topics of interest there.

The remainder of this document describes how to export data from your Omniform data file and import that data into your new Formdocs form template to create a Formdocs forms database that you will continue to use going forward. Note that this is an optional process that is important only if you want to carry over your legacy Omniform records to Formdocs.

## CONVERTING OMNIFORM DATA FILES

To summarize, you will EXPORT data as *Text* from Omniform and then IMPORT that data into your Formdocs template to create a Formdocs forms database having the same number of records as you had in Omniform.

The following instructions assume Omniform v5.x. If you have an earlier version of Omniform you may need to match the intent of these instructions to the actual commands in your version.

### EXPORTING DATA FROM OMNIFORM

1. In Omniform Filler open the 'File' menu and choose, **Export Data**; the 'Export Data' dialog box appears.
2. In the 'Export' dialog box, press **New**; the 'Export Setup' dialog box appears
3. In the 'Export Setup' dialog box, under "Export To", select **ODBC Database**.
4. In the 'Export Setup' dialog box, press **Administrator**; the 'ODBC Data Source Administrator' dialog box appears.
5. In the 'ODBC Data Source Administrator' dialog box, click the tab titled, **System DSN**.
6. In the 'System DSN' panel, press **Add**; the 'Create New Data Source' dialog box appears.
7. In the 'Create New Data Source' dialog box, scroll the list and select, **Microsoft Text Driver (\*.txt; \*.csv)**, and then press **Finish**; the 'ODBC Text Setup' dialog box appears.
8. In the 'ODBC Text Setup' dialog box, do the following:
  - a. In the "Data Source Name" box, type the name, "*ConvertOmniformDataToFormdocs*" without any spaces.
  - b. In the "Description" box, leave it blank.
  - c. Under "Database Directory" place a checkmark in the box, "Use current directory".
  - d. Press **OK**; the 'ODBC Data Source Administrator/System DSN' dialog box re-appears.
9. In the 'ODBC Data Source Administrator/System DSN' dialog box, under "System Data Sources" select in the list the driver named, **ConvertOmniformDataToFormdocs**, then press **OK**; the 'Export Setup' dialog box re-appears.
10. In the 'Export Setup' dialog box, under "Available Data Sources", select the text driver named, **ConvertOmniformDataToFormdocs** and press **OK**; the 'Export As' dialog box appears.

11. In the 'Export As' dialog box do the following:
  - a. At "Save in", select the folder where you want the exported data to go.
  - b. In the "File name" box, type a *descriptive* name for the export file; for example, "**Purchase Order Data Export from Omniform**"; this will help you recognize its purpose, later.
  - c. In the "Save as type" box, select **Microsoft Text Driver (\*.txt; \*.csv)**, and then press **Save**; the 'Export' dialog box appears.
  
12. In the 'Export' dialog box do the following:

Under "Fields in:", select the Omniform fields you want to include in the export and press **Add**; if you want ALL fields to be included (the usual choice) you can select the first field in the list, then scroll the list to the bottom, hold down the **<SHIFT>** key and then click the last entry in the list; you will see ALL entries become selected and then you can press **Add**.

Under "Fields to Export" will be listed all of the Omniform fields that will be included in the export.

When you are done adding fields to be exported, press **OK**; you will be prompted, "*What do you want to do with the export selections...*"; press **Run**; the export operation will begin.
  
13. If the export succeeds then you will see a message, "*Successfully exported n records*". Press **Cancel**. You now have a text file of your Omniform data that is ready to be imported into your Formdocs template.

Continue reading the next section...

## IMPORTING DATA INTO FORMDOCS

Before you can perform the following steps, you must first complete the instructions at EXPORTING DATA FROM OMNIFORM, above.

1. In Formdocs Filler, choose **File/New** and select the Formdocs template (\*.fdt) you created by converting the Omniform Design file.
2. In Formdocs Filler, choose **File/Import**; the 'Import From' dialog box appears.
3. In the 'Import From' dialog box, located to the right of the "File name" box, open the drop-down list and choose **Text**. Then locate and select the text file you exported from Omniform, and then click **Open**. The Formdocs 'Import Text' dialog box appears.
4. In the Formdocs 'Import Text' dialog box, select **Comma** as the field delimiter and then put a check mark in the box labeled **First row contains field names**; then click **OK**.
5. If all of the fields in the file being imported exactly match all of the fields on the Formdocs template, a message will display, "The import file is an exact match..." and also prompt you to view or edit the field matching; you should choose '**No**'. The import operation will begin, and you can skip to step 6, below.

Otherwise, if any of the fields in the file being imported cannot be matched to any fields on the Formdocs form template, a message will prompt you to view the field matching, and you must press **Match**; the 'Import Matching' dialog box appears.

In the 'Import Matching' dialog box you must match fields in the file being imported to fields on the Formdocs form template by selecting a Formdocs form field in the *left* column, selecting an Omniform field in the *right* column, and then clicking the **Match** button. Match as many fields as you desire. Note that you do not need to match all fields, but any fields left un-matched will not be imported.

When you are done matching fields, click **OK**; the import operation will begin.

6. After importing completes, click **File/Save As** to name and save the Formdocs form file (\*.fdd) you just created.
7. You may now use Formdocs Filler to navigate, add records to, search, sort, and list records in the new form file.

- End -