

ImagEze Automation Wizard

User's Guide

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1.0 Automation Wizard Overview

ImagEze includes an automation wizard that allows you to automate some of the functionality of the software. The Automation Wizard allows you to setup automation files that can be run by another user by simply double clicking a file. You can automate functions such as opening the software, opening a form template, processing forms, saving data, running reports and closing the software. This feature is useful for simplifying tasks for your users.

Tip: The Automation Wizard allows you to automate basic features of the software. These features are described in the main ImagEze user's guide. Therefore, each feature will not be presented in detail in this user's guide. You can learn about specific features by locating them in the ImagEze User's Guide.

1.1 Using the Automation Wizard

The Automation Wizard is accessed within the ImagEze Data Center. It uses a wizard-based approach to help you setup a custom automation file.

To use the Automation Wizard

- 1 From the **ImagEze Data Center**, select the **Tools** menu and then click **Automation Wizard**.
- 2 Use the **Next>>** button to navigate between screens, which are described in the sections that follow. You may also click the links in the Task Pane in the left portion of the wizard.
- 3 When finished building the file, click the **Save** button to save it as an automation file. The **Save** button has three options:

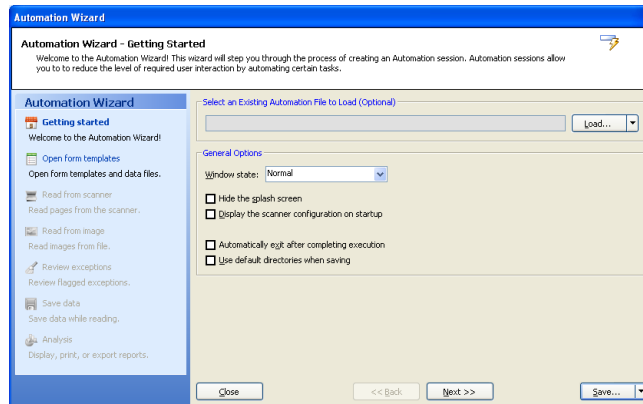
Option	Description
Save	Saves the Automation Wizard file as an automation file. This file can then be double clicked to execute or called from another application. Using this option will close the Automation Wizard.
Execute	Executes the Automation Wizard file without saving. This feature is useful for testing your file settings.
Save and Execute	Saves the Automation Wizard file as an automation file and executes it immediately.

Once you save the Automation Wizard file (.rez file), users simply have to double click the file to launch the software with the parameters you have specified. You can place this file anywhere on the system where ImagEze is installed.

Due to the number of potential steps in the wizard, each step will be broken into its own section that follows.

1.1.a Getting Started Options

The first step in the Automation Wizard allows you to setup general software options:

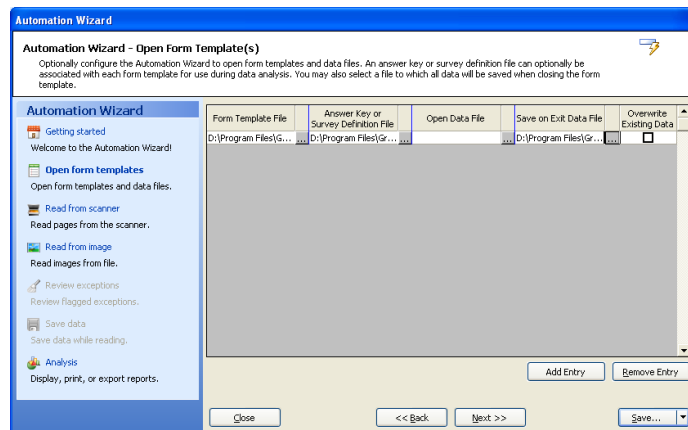


Option	Description
Load	The Load button provides two options: <i>Load:</i> Loads a previously saved Automation Wizard file so that you can make changes or execute it. <i>New:</i> Allows you to begin building a new Automation Wizard file.
Window State	Configures how the main ImagEze window will appear when the software is launched: <i>Normal:</i> Displays the software in its default state. <i>Minimized:</i> Leaves the software minimized on the desktop so that the user can easily continue doing other things while processes are being executed. <i>Maximized:</i> Displays the software full screen. <i>Hidden:</i> Runs the software in a hidden state so that the user does not see the software running. Most prompts are suppressed.

Option	Description
Hide the splash screen	Mark this checkbox to hide the splash screen that displays when the software is first launched.
Display the scanner configuration on startup	Mark this checkbox to show the scanner properties window when the software is launched so that the user can configure the scanner.
Automatically exit after completing execution	Mark this checkbox to have ImagEze automatically close once it has executed all of the parameters in the Automation Wizard file.
Use default directories when saving	Mark this checkbox to have data files and stored images saved to the directories specified in the software preferences.

1.1.b Open Form Templates Options

The Open Form Templates screen allows you to select which templates and related files to open automatically:

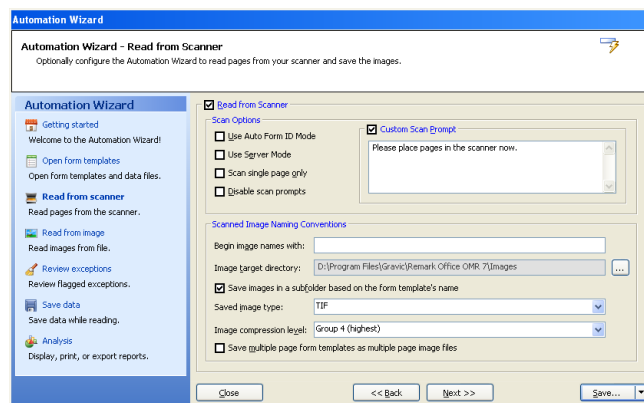


Option	Description
Form Template File	Click the ellipsis (...) to select a form template to open automatically. You may open form templates (OMR), batch files (OBF), Remark Office Archive files (ROA) or Remark (RMK) data files. When opening ROA and RMK files, the associated form template file will open with the data file automatically (note that the files must be in the same location as specified when saving the data in order for this to work).
Answer Key or Survey Definition File	Optionally, click the ellipsis (...) to open an existing answer key or survey definition file. This file will be executed after forms are processed. Grading and Tabulation parameters are specified in the last step of the Automation Wizard. You have several options for the use of this file: <ol style="list-style-type: none">1) If using Easy Grade or Easy Survey, this file will be used to produce the results.2) If using the Grade Wizard, do not specify grading options in the last step of the Automation Wizard. Instead, if an answer key file is specified in the Automation file, you can run the Grade Wizard manually (e.g., click the toolbar button, task pane option or menu option) and the specified Grade Wizard file will be opened automatically. You may click Finish to grade the data or click Next>> to further configure the selected Grade Wizard file.4) If using the Survey Wizard you will need to run the Survey Wizard manually (e.g., click the toolbar button, task pane option or menu option) and then the specified file will be automatically loaded into the Survey Wizard. You may click Finish to tabulate the data or click Next>> to further configure the selected Survey Wizard file.

Option	Description
Open Data File	Click the ellipsis (...) to select a data file to open automatically. You may open any one of the supported file formats. When opening ROA and RMK files, the associated form template file will open with the data file automatically (note that the files must be in the same location as specified when saving the data in order for this to work). When opening data prior to processing forms, the new data will be added onto the end of the data file. You will most likely want to overwrite the entire data file once you process additional forms in this case.
Save on Exit Data File	Click the ellipsis (...) to select a data file for saving the data after forms are processed. You may choose an existing file or enter a new file name. Data from any open form templates will be saved when the software is closed.
Overwrite Existing Data	Mark this checkbox to overwrite the data file(s) specified each time the Automation Wizard file is run.
Add Entry	Click the Add Entry button to add another row where you may make further selections (e.g., open another form template, save data, etc.).
Remove Entry	Click the Remove Entry button to remove the currently selected line of parameters.

1.1.c Read from Scanner Options

The Read from Scanner screen allows you to select the parameters to use for scanning forms:

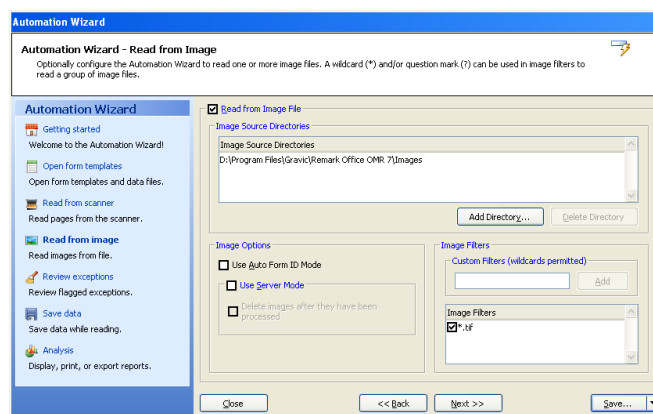


Option	Description
Read from Scanner	Mark this checkbox to use the scanner to scan forms once a form template is opened.
Use Auto Form ID Mode	Mark this checkbox to scan in Auto Form ID mode. This feature will only apply to form templates that have Auto Form ID regions on each page, allowing you to scan multiple forms at one time.
Use Server Mode	Mark this checkbox to scan in Server Mode. Server Mode provides unattended scanning where the scanner will be polled for forms at user-specified intervals. Any forms found in the scanner will then be scanned and data produced.
Scan single page only	Mark this checkbox to only scan a single page placed in the scanner.
Disable scan prompts	Mark this checkbox to disable any scanning prompts. Scanning will commence without any interaction from the user. When the ADF is empty, scanning will simply stop with no additional prompts.
Custom Scan Prompt	Mark this checkbox to enter your own customized scanning prompt. Enter the text you wish to display when scanning commences in the box below the checkbox.
Begin image names with	Enter a file base name that the software can use to name the images stored for this form template as forms are scanned. You may use any name you like. We suggest using something that identifies to you that the images belong to a certain form (e.g., form template name). The images that are stored will all begin with this base name and then have the page number (if larger than a one page form template), date and time appended to them to keep track of the various images. If you leave the Begin image names with option blank, your images will only have the page number (if applicable), date and time as the name of each image.

Option	Description
Image target directory	Click the ellipsis (...) to select a location in which to store the images for this form. You may use the default directory for images (stored in the software's preferences) or select a different directory.
Save images in a subfolder based on the form template's name	Mark this checkbox to have ImagEze automatically create a folder in which to store these images. The folder name will be the name of the form template and the folder will be created in the directory you have selected in the Image target directory box.
Saved image type	Select an image type to use for storing images. The choices are: PCX/DCX, TIF or PDF.
Image compression level	When saving to the PDF or TIF formats, you can choose the compression rate: Uncompressed, Group 3, Group 3 2d and Group 4 . Group 4 will create the most compressed (smallest file size) image.
Save multiple page form templates as multiple page images files	Mark this checkbox if you are scanning with a multi-page form template and would like all of the images for one complete form to be saved as one image file.

1.1.d Read from Image Options

The Read from Image screen allows you to specify parameters for processing stored image files (e.g., if you scan forms on a multi-function peripheral and then save them as image files for ImagEze to process):

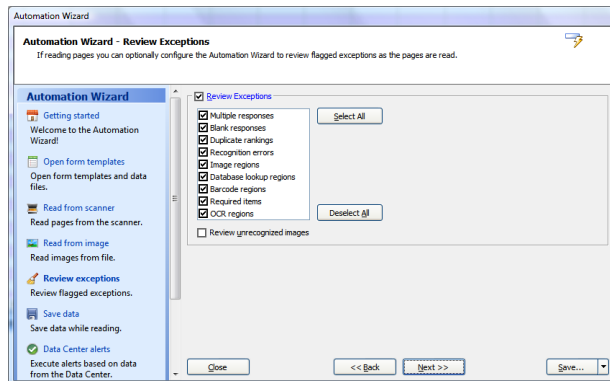


Option	Description
Read from Image File	Mark this checkbox to process image that you have already scanned and saved as image files.
Add Directory	Click the Add Directory... button to add a search directory to the Image Source Directories box. Any directories listed in this box will be used to find image files to process.
Delete Directory	Click the Delete Directory button after selecting a directory in the Image Source Directories box to remove it from the search when processing image files.
Use Auto Form ID mode	Mark this checkbox to process images in Auto Form ID mode. This feature will only apply to form templates that have Auto Form ID regions on each page, allowing you to scan multiple forms at one time.
Use Server Mode	Mark this checkbox to process images in Server Mode. Server Mode provides unattended image processing where the specified directories will be polled for images at user-specified intervals. Any images found will then be processed and data produced.
Delete images after they have been processed	If using Server Mode, mark this checkbox to delete the images once they have been processed. Note that using this feature will permanently delete the images from your computer. However, if the images remain and you stop and start Server Mode, the images will be processed again.

Option	Description
Custom filters	Use the Custom Filters box to refine your Image Filters list. Image filters represent the types of image files you wish to process. You can specify specific cases here by using wildcards. For example, if you wanted to process all images that start with "English 101" you could enter "English 101*.*" as a custom filter. Only images that start with this text will be processed. Type the custom filter into the Custom Filter box and then click the Add button. The filter will be added to the Image Filters list and automatically selected. Note that when specifying image types, an asterisk (*) can be used to indicate any number of characters (e.g., .jp* would allow any number of characters after the "jp" such as .jpg and .jpeg), and the question mark (?) can be used to indicate any single character in addition to the specified file extension (e.g., .jp? would only allow three character extensions such as .jpg),
Image filters	Mark the checkboxes corresponding to the types of images that you wish to process. Only images corresponding to these file types will be read; all others will be ignored.

1.1.e Review Exceptions Options

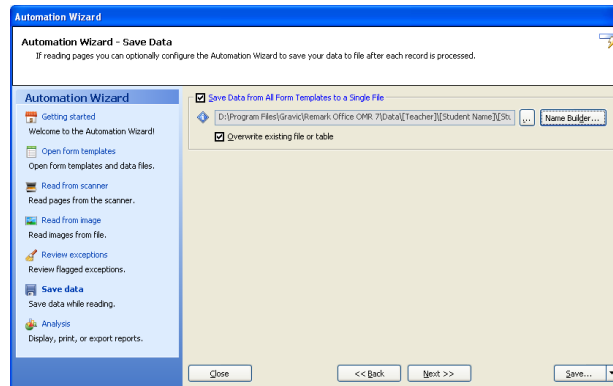
The Review Exceptions window allows you to specify whether to review exception cases during form processing and which cases to review:



Option	Description
Review Exceptions	<p>Mark this checkbox to activate the Review Exceptions feature during form processing (scanning or reading image files). When selected exception cases are found, processing will stop and the user will be required to take action (either correct the exception or continue the processing without correction). The following exceptions are available:</p> <ul style="list-style-type: none">Multiple responsesBlank responsesDuplicate rankingsRecognition errorsImage regionsDatabase lookup regionsBarcode regionsRequired itemsOCR regions
Review unrecognized images	<p>Mark this checkbox if processing forms with Form, Page or Respondent Tracker IDs. If an image cannot be matched to its form template, form template page or respondent, processing will stop and you will be able to identify the form, page or respondent.</p>


1.1.f Save Data Options

The Save Data Options screen allows you to specify saving options while forms are being processed. As each page is processed, the data is written directly to the file specified. This feature allows you to send data to an external file right as the forms are processed so that some other action can be taken on the data. **Any changes made after processing the forms are not written to this file.**



Option	Description
Save data from all open form templates to a single file	Mark this checkbox to save all data collected to one data file. Click the ellipsis (...) to select an existing data file or enter a new file name. Once the file is selected you will be prompted to overwrite or append to the file each time.
Overwrite existing file or table	Mark this checkbox to overwrite the selected data file each time the Automation Wizard file is executed.

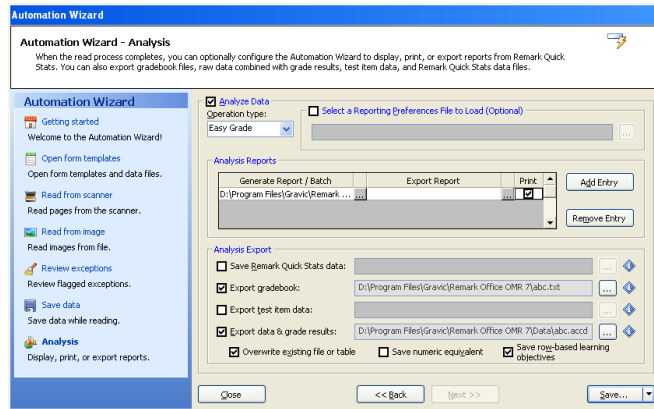
Option	Description
Name Builder	<p>The Name Builder button allows you to further customize how data files are named and stored. In the File Name area, you may choose to add a region from the processed data to the file base name. Choose the region from the drop-down list and then click the Add button. For example, if processing tests, you could add a Student Name field that is being collected from the form so that data file names all begin with the students' names.</p> <p>In the Target Directory area, you may choose to add a region from the processed data to the folder structure that will hold the data files. Choose the region from the drop-down list and then click the Add button. For example, if processing tests, you could add teacher name and student name fields that are being collected from the form so that each student's data is stored in a folder containing the teacher's name and then a subfolder containing the student's name.</p>

Tip: Hover the mouse over the  to view details about the file you have selected.

1.1.g Analysis Options

The Automation Wizard can produce reports using ImagEze Quick Stats. You may run grade or survey operations, as well as save and export reports.


Note: To learn more about ImagEze Quick Stats, please see the ImagEze Quick Stats User's Guide PDF file by clicking **Start|Programs|ImagEze 7|Documentation**.



Option	Description
Analyze Data	Mark this checkbox to run analysis on your data.
Operation type	Choose Easy Grade, Easy Survey, Grade Wizard or Survey wizard from the list to automatically launch this type of analysis.
Select a Reporting Preferences File to Load	Allows you to select a set of ImagEze Quick Stats preferences that you want to use for this report. These preferences may be exported from a copy of ImagEze Quick Stats so that they may be used here. If your copy of ImagEze Quick Stats is already using the preferences you desire for this report, you may skip this option.

Option	Description
Generate Report / Batch	Click the ellipsis (...) to choose the individual report (.rpx) or report batch file (.rbwx) you wish to generate. Report batches are created in ImagEze Quick Stats using the Report Batch Wizard. This wizard allows you to generate, print and/or export multiple reports without having to select each one individually. Note: If you select a report batch, the exporting and printing options will be disabled, as these options are setup in the batch file.
Export Report	Click the ellipsis (...) to choose a file type and location to which to export the report.
Print	Mark this checkbox to print the report once it is displayed.
Save ImagEze Quick Stats data	Mark this checkbox to save the ImagEze Quick Stats data as an RQS file for reuse within ImagEze Quick Stats. Then click the ellipsis (...) to choose a location in which to save the file.
Export gradebook	Mark this checkbox to export the grade results to a gradebook file. Then click the ellipsis (...) to choose the gradebook type and a location in which to save the file.
Export test item data	Mark this checkbox to export the grade results to a test item data file. Then click the ellipsis (...) to choose the file type and a location in which to save the file.

Option	Description
Export data & grade results	Mark this checkbox to export the data and grade results to a file. Then click the ellipsis (...) to choose a file type and a location in which to save the file. If you wish to overwrite an existing file, mark the checkbox for Overwrite existing file or table . If you wish to save the numeric equivalents for the data set, mark the checkbox for Save numeric equivalent . If you wish to save the learning objectives in a row based file (each learning objective per student is a data record), mark the checkbox for Save row-based learning objectives .

Tip: For the **Analysis Export** section, place the mouse over the information button, , to view details about the file you have selected.

1.2 Saving and Executing Automation Wizard Files

Once you have created the Automation Wizard file, you can click the Save button to save it, or use the drop-down arrow on the Save button to either execute without saving (e.g., to test the file) or to Save and Execute the file. When an Automation Wizard file is saved, it has a .rez extension. You can place this file, which behaves like an executable, on a system. When double clicked, the commands built into the .rez file will launch.