

OpenText™ Intelligent Capture

**Desktop Client Operator Guide:
Identification and Completion**

This guide describes how to use the Identification and Completion modules in production.

ECPCORE220300-UCV-EN-01

OpenText™ Intelligent Capture
Desktop Client Operator Guide: Identification and Completion
ECPCORE220300-UCV-EN-01
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Table of Contents

1	Introduction	5
1.1	Concepts	5
1.2	Identification	6
1.3	Completion	7
2	Tasks	9
2.1	High-Level Procedures	9
2.1.1	Identification	9
2.1.2	Completion	10
2.2	Getting Batches	12
2.3	Reorganizing Folders, Documents, and Pages	12
2.3.1	Folders and Higher-Level Nodes	13
2.3.2	Documents	15
2.3.2.1	Assembling Documents Automatically (Identification Only)	19
2.3.3	Pages	22
2.4	Changing the Page View	24
2.4.1	Zooming and Rotating Pages	24
2.4.2	Zooming into the Image Area	27
2.4.3	Automatic Panning	28
2.5	Assigning Templates (Identification Only)	28
2.5.1	Assigning a Template to a Page	29
2.5.2	Assigning Templates Automatically	35
2.6	Resolving Classification Conflicts (Identification Only)	36
2.7	Validating Fields in Identification	38
2.8	Validating Data in Completion	39
2.8.1	Validating Fields	39
2.8.1.1	Fixing Low-Confidence Characters	41
2.8.1.2	Editing Text Fields	42
2.8.2	Table Data	42
2.8.2.1	Adjusting the Table View	43
2.8.2.2	Editing Tables	43
2.8.3	Extracting Table Data	45
2.8.3.1	Table Extraction Mode	46
2.8.3.2	High-level Steps for Extracting Table Data	47
2.8.3.3	Common Extraction Scenarios	47
2.8.3.4	Extracting Tables	48
2.8.3.5	Cleaning up the Extraction Results	49
2.8.4	Changing the Document Type	51
2.9	Directly populating fields with data from the image	52
2.9.1	Click to Extract	53

2.9.2	Basic Rubberbanding	53
2.10	Flagging Documents, Pages, or Fields With Reasons	54
2.10.1	Applying and Removing Flags	55
2.10.2	Applying Flags in Page Mode (Completion Only)	57
2.11	Annotating Pages With Auxiliary Information	58
2.11.1	Types of Annotations	58
2.11.2	Adding Annotations	59
2.11.3	Editing Annotations	62
2.11.4	Copying Annotations	62
2.12	Finishing Tasks	63
2.13	Deferring Tasks	64
2.14	Stopping Work	66
3	Reference	69
3.1	Changing the Main Window Layout	69
3.2	Changing the Documents Panel Layout	72
3.2.1	Tree View Mode (Identification Only)	73
3.2.2	Page List Mode (Identification Only)	75
3.3	Printing	77
3.4	Keyboard Shortcuts	78
3.4.1	Default Keyboard Shortcuts	78
3.4.2	Shortcut for Switching Between Panels	84
3.4.3	Shortcuts for Editing Text in Fields	84
3.4.4	Shortcuts for Navigating and Selecting Items in the Documents pane ..	86
3.4.5	Shortcuts for Moving in the Form Panel (Completion Only)	88
3.4.6	Shortcuts and Arrow Keys for Moving Around the Page	89
3.4.7	Windows Shortcuts	90

Chapter 1

Introduction

Identification and Completion together enable people to quickly classify documents and validate extracted data that the automated Classification and Extraction modules failed to classify and validate.



Note: Unless otherwise indicated this guide applies to both Completion and Identification.

1.1 Concepts

Before you begin to receive work, ensure you review and understand the terminology.

Batch

A *batch* is a group of pages to be processed as a unit using a predetermined set of instructions specified in a process. All information scanned or imported into the system is stored in a batch. Batches are structured hierarchically and represent different processing levels. The batch tree structure includes up to 8 levels, with 0 (page) being the lowest and 7 (batch) being the highest.

Node

A *node* represents a processing level in the batch hierarchy. Pages, documents, and folders are examples of nodes.

Task

A *task*, also referred to as *work*, is a unit of work that you process. The level is determined by the process designer. Work can be a page, a document, or higher, up to an entire batch.

The operator selects work, either a particular batch of documents or all batches available. Batches are created on the server from the series of scanned or imported electronic pages. A batch can be arranged into a multilevel hierarchy of folders, documents, and pages.

The server controls the processing of each batch. Identification, or manual classification, is one of the batch processing steps that typically follows automatic classification. When a portion of a batch is ready for manual classification, the server forms a task and sends it to the operator who has signed up for this batch. Typically, after the operator has completed manual classification, the batch is returned to the server, which sends it for automatic data extraction and then manual data validation using Completion.

Page

A *page* is a single-sided image that is scanned, faxed, or received electronically into an Intelligent Capture Server. One or more pages make up a document.

Document pages display in the **Documents** panel as thumbnails. The images are numbered and are ordered by page location, first to last, within the batch tree.

Document

A *document* represents a physical, printed document, fax, or email message that has been converted into digitized data by scanning or importing it into an Intelligent Capture Server. For example, a telephone bill or an invoice. A document can be composed of multiple pages.

A document represents the level 1 node in the batch tree structure and is displayed in the **Documents** panel.

Each document has a sequence number that identifies its position within the folder, starting with **1**. A document name is also shown if it is defined by the document type designer.

Folder

A *folder* is a virtual container for documents and pages. It represents the level 2 node in the batch tree structure. Folders display in the **Documents** panel for tasks that are at level 2 and above.

Each folder has a position number followed by the folder name (if it is defined by the designer). The number is relative to the task level. For example, if the task is at level 3 (folder), then the folders are numbered 1, 2, 3, and so on. If the task is at level 4, then the folders in the first level 4 node are numbered 1.1, 1.2, and so on; in the second level 4 node, they are numbered 2.1, 2.2, and so on.

Higher-Level Node

A *higher-level node* in the tree structure is represented in the **Documents** panel by a separator line between folders.

1.2 Identification

Intelligent Capture Identification completes and corrects the automatic classification process by enabling operators to manually classify all documents that were not classified automatically by the Classification module. Operators classify documents as follows:

- For both recognition and information extraction projects, operators assign documents to document types.
- For recognition projects, operators also assign pages to templates, which have been defined in a recognition project. In addition, data validation might also be required.

1.3 Completion

Intelligent Capture Completion is the unified, high-performance operator client that provides a full-featured interface for indexing images and validating index data.

Chapter 2

Tasks

Unless otherwise indicated the tasks outlined in this section apply to both Completion and Identification.

2.1 High-Level Procedures

In addition to the standard menu items, you can also perform actions as follows.

Keyboard shortcuts

Keyboard shortcuts provide a high-speed alternative to using the mouse and are often the most efficient way to perform an action. Default shortcut keys are provided for operation without a mouse.


Your administrator might have changed the default keyboard mappings. Contact your administrator for a list of keyboard shortcuts. For a consolidated list of default shortcut keys, see [“Keyboard Shortcuts” on page 78](#).


Right-clicking

Right-clicking is also known as a context menu.


Right-click an item and select from the list of actions that are valid for the item.

2.1.1 Identification

1. To start Identification, click the Identification icon () and then log in and get work. For more information, see [“Getting Batches” on page 12](#).

 **Note:** For your user account information, see your administrator.

2. Perform the following actions as required to complete the task:

 **Note:** Depending on how your administrator set up Identification, you might not have to assign a template to every page to finish the task. For example, you might be able to finish a task even if it has pages without assigned templates or pages (including whole documents) that have been flagged.

- Assign templates to pages.
 - If a document was not assigned a document type or template code automatically, assign it manually. For more information, see

“Assembling Documents Automatically (Identification Only)” on page 19.

- Assign (or reassign) a template to the page or assign the last used template to selected pages where possible. For more information, see “Assigning Templates (Identification Only)” on page 28.
 - Resolve classification conflicts. For more information, see “Resolving Classification Conflicts (Identification Only)” on page 36.
 - Flag documents, pages, or fields. For more information, see “Flagging Documents, Pages, or Fields With Reasons” on page 54.
 - Annotate pages. For more information, see “Annotating Pages With Auxiliary Information” on page 58.
 - Validate data. For more information, see “Validating Fields in Identification” on page 38.
3. Finish the task, defer the task, or stop working.
For more information, see:
- “Finishing Tasks” on page 63
 - “Deferring Tasks” on page 64
 - “Stopping Work” on page 66

2.1.2 Completion

A task usually consists of multiple pages in several documents, all of which need to be checked; however, a task could also consist of the following pages:

- A single page only.
- Documents in which only a subset of pages are available to be checked; that is, pages that do not need to be checked have been filtered out.

In these cases, only the applicable panels and operations are available as follows:

- If a task consists of multiple pages in one or more documents, then all panels are displayed. (This configuration is sometimes called the *default mode*.)
- If a task consists of a single page only (which is not contained within a document), then only the **Page View** panel, the **Reasons for Flagging** panel, and message bar are displayed; in addition, the **Page View** panel displays **CURRENT PAGE**. (This configuration is sometimes called *page mode*.)

You should inspect the page and accept or reject it quickly.

The high-level steps for processing a task are as follows:

1. To start Completion, click  and then log in and get work.

For your user account information, see your administrator. For more information, see [“Getting Batches” on page 12](#).

2. Verify the image quality of each page.

You might also need to flag pages that have image quality issues.

For more information, see:

- [“Zooming and Rotating Pages” on page 24](#)
- [“Flagging Documents, Pages, or Fields With Reasons” on page 54](#)
- [“Changing the Documents Panel Layout” on page 72](#)
- [“Shortcuts and Arrow Keys for Moving Around the Page” on page 89](#)

3. Verify that the task structure is correct.

For example, make sure that documents include complete sets of pages, pages are split into separate documents correctly, and the order of pages in each document is correct. For more information, see [“Reorganizing Folders, Documents, and Pages” on page 12](#).

4. Validate the data in [index fields](#) and [table fields](#).

For example, you might need to enter data manually (with [rubberbanding](#)), change document types, flag fields that have issues, or annotate a page that has field issues.

For more information, see:

- [“Validating Fields” on page 39](#)
- [“Basic Rubberbanding” on page 53](#)
- [“Table Data” on page 42](#)
- [“Changing the Document Type” on page 51](#)
- [“Flagging Documents, Pages, or Fields With Reasons” on page 54](#)
- [“Annotating Pages With Auxiliary Information” on page 58](#)

5. Finish the task, defer the task, or stop working.


For more information, see:

- [“Finishing Tasks” on page 63](#)
- [“Deferring Tasks” on page 64](#)
- [“Stopping Work” on page 66](#)

2.2 Getting Batches

After logging in, the **Get Work** window is displayed and you select the work to complete.

To get work:

1. Select one of the following:
 - **(All Batches)**: You receive tasks from all batches available for processing.
 - *<batch_name>*: You receive tasks from the selected batch only. When selecting a particular batch from the list:
 - Consider taking a batch with the highest priority first.
 - Notice the amount of the remaining tasks shown in the **Tasks** column and select work accordingly.
-  **Note:** Other operators may receive tasks from the same batch as well. In this case, you may see the **Tasks** column updated to show a lower number of remaining tasks.
- Sort the list of batches by a column if necessary.
 - Filter the list of batches by the batch name if necessary. Start typing a batch name in the filter box to view the batch names that contain the entered text. The filter is case-insensitive.
2. Click **Get Work**.

You can also filter the list of available batches by department as follows:

- To get work from any department, click the **Select All** button.
- To get work from a particular department, in **Departments**, select the required checkbox.
- To get work that has no department assigned, in **Departments**, select the **(Unassigned)** checkbox.

2.3 Reorganizing Folders, Documents, and Pages

When you receive a new multi-page task, consider verifying the task structure in the **Documents** panel prior to validating document data or classifying pages. Make sure that all documents include complete sets of pages, all pages are split into separate documents correctly, and the order of pages in each document is correct.

Sometimes, documents in a task are not separated properly; for example, when any document in the task combines pages that belong to two or more physical documents. In this case, you can split and merge the documents and higher-level nodes as appropriate to reflect their correct structure. Splitting is used to create a document, or to insert a new folder or a higher-level node (at the desired level), and

move the current content into it. Merging is used to move the content from a document, or a folder, or a higher-level node (at the desired level) to the previous document or folder, after which the emptied node is deleted from the batch.



Caution

All operations described in this section modify the batch structure. These changes are saved to the server immediately and cannot be reverted. After you perform any of these operations, the task cannot be returned to the queue with **Abandon changes**. However, for splitting and merging, you could subsequently perform the opposite merge or split operation to go back to the original structure.



Notes

- Some operations must be enabled by your administrator.
- In Completion, if a task includes filtered pages (also known as *page filtering mode*), then you cannot modify (including moving and deleting pages) the task structure. A document with filtered pages has the following icon:



2.3.1 Folders and Higher-Level Nodes






In the **Documents** pane, you can perform the following actions on folders and nodes higher than the folder level:




Notes

- Unless otherwise indicated, the term, folder, also includes nodes higher than the folder level. Nodes higher than the folder level are only available in Identification.
- If an operation is not available, then you do not have the appropriate permissions. See your administrator.
- In Completion, if a task includes filtered pages (also known as *page filtering mode*), then you cannot modify (including moving and deleting pages) the task structure.

Icon/Menu Item	Description
Edit > Copy	Makes copies of the selected folders and moves them to the Clipboard.

Icon/Menu Item	Description
<p>Edit > Cut</p>	<p>Cuts the selected folders from the batch and copies them to the Clipboard.</p> <p> Tip: You can also perform a cut and paste action by dragging and dropping a folder with the mouse.</p> <p> Caution You can move folders within current task only. If you cut a folder and then finish the task and get the next task, then attempting to insert the cut folders results in a fatal error and the cut elements with all data are lost.</p>
<p>Edit > Paste</p>	<p>Pastes folders after the selected folder.</p>
	<p>Splits the folder at the selected document in the current folder as follows:</p> <ul style="list-style-type: none"> • The selected document and all of the documents following it are placed into a new folder, which is created after the current folder. • All documents preceding the selected document are kept in the current folder. <p>(Identification only) When you split nodes above the folder level, all required nodes are created. For instance, splitting at level 4 creates a new node at level 4 after the current one in which you selected a document. This new level 4 node includes: a new level 3 node, a new folder (that is, a level 2 node) inside, and inside it the document at which you split and all of the following documents from the current folder.</p> <p> Note: If the selected document is the first document in the current folder, then a new empty folder is created before the current folder (which is left unchanged).</p>
	<p>Adds the documents of the selected folder to the preceding folder after the last document in the preceding folder; the current folder is deleted.</p> <p>You select a folder by selecting either the folder node or a document in the folder.</p>

Icon/Menu Item	Description
Edit > Delete	Deletes the selected folder.  Caution After you delete a page, document, or folder, the modified batch structure is saved to the server immediately and you cannot revert the change.


2.3.2 Documents

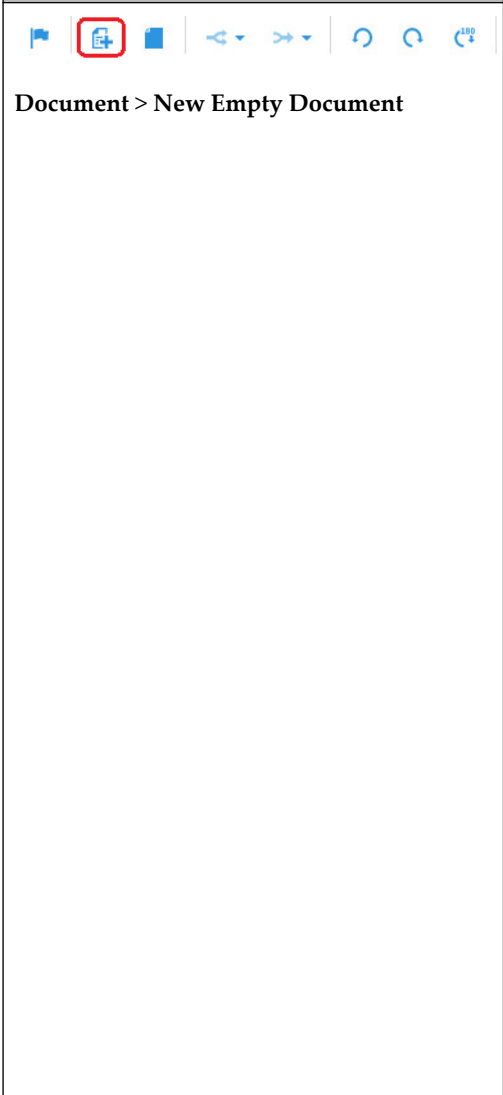


In the **Documents** pane, you can perform the following actions on documents:








Notes



- If an operation is not available, then you do not have the appropriate permissions. See your administrator.
- In Completion, if a task includes *filtered pages*, then you cannot modify (including moving and deleting pages) the task structure.

Icon/Menu Item	Description
Edit > Copy	Makes copies of the selected documents and moves them to the Clipboard.
Edit > Cut	Cuts the selected documents from the batch and copies them to the Clipboard.  Caution You can move pages and documents within current task only. If you cut a page or a document and then finish the task and get the next task, then attempting to insert the cut page or document results in a fatal error and the cut elements with all data are lost.
Edit > Paste	To paste documents after another document, select the document. To paste documents at the beginning of another document, select the document.

Icon/Menu Item	Description
 <p>Document > New Empty Document</p>	<p>Inserts an empty document as follows:</p> <ul style="list-style-type: none"> • If the selected item is a document, then an empty document is inserted before the selected document. • If the selected item is a folder, then an empty document is inserted as the first document in the selected folder. <p> Notes</p> <ul style="list-style-type: none"> • If configured by your administrator, empty documents and folders are highlighted in a frame of a different color. If you see highlighted empty nodes, no special action is required. A task with empty nodes is not corrupted and can be successfully finished. • In Identification, if you switch the Documents panel to the page list mode, the Binding field displayed and you cannot insert empty documents and split/merge the existing documents. Documents are split and merged automatically based on the binding field or separator template, as described in “Assembling Documents Automatically (Identification Only)” on page 19. However, you can split and merge nodes above the document level if you have respective permission granted. <p> Tip: You might need a special empty document to collect pages that do not belong to any other document.</p>

Icon/Menu Item	Description
 <p>Document > New Document</p>	<p>Creates a new document by splitting the document at the selected page in the current document as follows:</p> <ul style="list-style-type: none">• All pages preceding the selected page are kept in the current document.• The selected page and all of the pages following it are placed into a new document (which follows the current document). <p> Note: The new document has the same document type as the current document; however, only the current document has the original field data.</p>

Icon/Menu Item	Description
	<p>Adds the pages of the selected document to the preceding document after the preceding document's last page.</p> <p> Notes</p> <ul style="list-style-type: none"> • You select a document by selecting either the document node or a page in the document. • You can merge only documents that are in the same folder. <p>Merging is useful when two or more documents in the task contain pages that actually make up a single document, such as a purchase order and its attachment pages. You can also use merge to revert the split operation.</p> <p> Caution</p> <ul style="list-style-type: none"> • In Completion, after merging, only the first document will have the original data. The data for the second document is discarded. The changes are committed to the server immediately and cannot be reverted. If you apply the split operation to revert the merge, the data lost after the previous merge will not be restored. • In Identification, if you merge documents that were assigned a document type or code before the operation, the following changes are committed to the server immediately and cannot be reverted: <ul style="list-style-type: none"> – After merging, only the first document will have the original classification data. The data for the second document is discarded and only the data for the first document is kept. – If you merge documents in auto-assignment mode, all moved pages are reclassified with new templates as specified by the assigned document type or

Icon/Menu Item	Description
	code; pages classified with new templates get new index fields. If you apply the split operation to revert the merge, the previous classification data for the moved pages will not be restored.
Edit > Delete	<p data-bbox="959 594 1289 621">Deletes the selected document.</p> <div data-bbox="959 653 1451 856" style="background-color: #f0f0f0; padding: 5px;">  <p data-bbox="1068 663 1187 695">Caution</p> <p data-bbox="1068 705 1446 846">After you delete a page, document, or folder, the modified batch structure is saved to the server immediately and cannot be reverted.</p> </div> <div data-bbox="959 888 1451 1115" style="padding: 5px;">  <p data-bbox="1024 894 1430 1119">Note: If configured by your administrator, empty documents and folders are highlighted in a frame of a different color. If you see highlighted empty nodes, no special action is required. A task with empty nodes is not corrupted and can be successfully finished.</p> </div>

2.3.2.1 Assembling Documents Automatically (Identification Only)

Some operations that you perform during page classification can reassemble the document automatically.

After the documents are split or merged automatically based on a separator or field binding, you can correct the structure of the task manually. For instance, you can move pages between documents, or split and merge documents as needed.





 **Note:** If field binding is enabled, then you cannot split and merge documents nor add empty documents.

Table 2-1: Assembling Documents Automatically

Use Case	Description
<p><i>Case 1: The template contains a binding field</i></p>	<p>The purpose of the binding field is to assist in keeping expected pages together in the same document. For example, if an invoice number is specified as a binding field value and then you change the invoice number of the current document's first page to the same number as the last page in the previous document, then that first page would be split from the current document and merged into the previous document as the last page.</p> <p> Note: The Documents panel (page list mode) includes the Binding Field column that shows the binding value for each page.</p> <p>To merge adjacent pages into the same document, the pages must meet the following merging criteria:</p> <ul style="list-style-type: none"> • Their templates have the same template code. • They have the same binding field values or a blank value. <p>If one of the pages is an attachment (or does not have a binding field), then the binding field of the indexed page to which the attachment (or page without a binding field) is bound is evaluated.</p> <p>Furthermore, all pages in the same document must meet the aforementioned criteria.</p> <p> Notes</p> <ul style="list-style-type: none"> • A page with a blank binding field value acts as a wildcard and binds with a page that has any binding value, including another page that has a blank value. • A page without a binding field is handled the same way as an attachment. • Attachments are pages that are not indexed (and as such they cannot have binding fields). Examples of attachments are pictures of receipts itemizing charges in an invoice. A sequence of contiguous attachment pages are considered to be a single unit. This unit cannot be split and is


Use Case	Description
	<p>bound to an indexed page of the document of which the attachments were originally a part. The indexed page to which the attachment sequence is bound is the page that precedes the sequence; however, if the attachment sequence starts the batch, then the bound page is the one at the end of the sequence.</p> <p>Attachments could be anywhere in a document, including the middle.</p> <ul style="list-style-type: none"> • Separator pages take precedence over binding field values. See “Case 3: A task includes classified separator pages and field binding” in this table. <p>If you change the current page's binding field value to one that is different from the previous or next page (in the same or different documents), then one of the following occurs:</p> <ul style="list-style-type: none"> • If the current page is the first page in the document, then one of the following occurs: <ul style="list-style-type: none"> – If the previous page (that is, the last page in the previous document) meets the merging criteria, then the current page is split from the current document and merged with the previous document. – If the previous page does not meet the criteria or there is no previous document, then the current page is split from the current document and becomes the first page in a new document. • If the current page is the last page in the document, then one of the following occurs <ul style="list-style-type: none"> – If the next page (that is, the first page in the next document) meets the merging criteria, then the current page is split from the current document and merged with the next document. – If the next page does not meet the merging criteria or there is no next document, then the current page is split from the current document and

Use Case	Description
	<p>becomes the first page in a new document.</p> <ul style="list-style-type: none"> If the current page is in the middle of the document, then the current page and all of the following ones are split from the current document; the current page becomes the first page of a new document and the merging criteria are applied to each of the following pages.
<p><i>Case 2: A separator template is assigned or unassigned</i></p>	<p>If you classify any page in a document using a separator template, that is, a template with the “separator” attribute, the document is split at the separator page into two documents. Similarly, if you replace the separator template on the first page in a document with a different template, the document is merged with the previous document (if one exists).</p> <p> Note: Deleting a page with a separator template does not result in merging.</p>
<p><i>Case 3: A task includes classified separator pages and field binding</i></p>	<p>When a task includes classified separator pages and field binding, separator-based splitting and merging has a priority:</p> <ul style="list-style-type: none"> If you assign a separator template to any page in the task, that page starts a new document. If you reassign a different template to a classified separator page, the binding rules apply.



2.3.3 Pages


If an operation is not available, then you do not have the appropriate permissions. See your administrator.

In the **Documents** pane, you can perform the following actions on pages:

 **Note:** In Completion, if a task includes filtered pages (also known as *page filtering mode*), then you cannot modify (including moving and deleting pages) the task structure.

Icon/Menu Item	Description
<p>Edit > Copy</p>	<p>Makes copies of the selected pages and moves them to the Clipboard.</p>


Icon/Menu Item	Description
<p>Edit > Cut</p>	<p>Cuts the selected pages from the document and copies them to the Clipboard.</p> <p>You can also perform a cut and paste action by dragging and dropping pages with the mouse.</p> <div data-bbox="964 548 1451 869" style="background-color: #f0f0f0; padding: 10px;">  <p>Caution</p> <p>You can move pages and documents within current task only. If you cut a page or a document and then finish the task and get the next task, then attempting to insert the cut page or document results in a fatal error and the cut elements with all data are lost.</p> </div>
<p>Edit > Paste</p>	<p>To paste pages after another page, select the page.</p> <p>To paste pages at the beginning of a document, select the document.</p> <div data-bbox="964 1045 1451 1663" style="padding: 10px;">  <p>Note: New in 22.1, the following IA Values continue to be available after copying and can be pasted multiple times:</p> <ul style="list-style-type: none"> • <i>AnnotationComment</i> • <i>Backside</i> • <i>Image</i> • <i>ImageType</i> • <i>OcrDataCache</i> • <i>PageDataXml</i> • <i>PageFlag</i> • <i>Rotation</i> • <i>SourceNodeID</i> <p>For more information, see <i>OpenText Intelligent Capture - Desktop Client Guide: Identification and Completion (EPCORE-CCV)</i>.</p> </div>




Icon/Menu Item	Description
<p>Edit > Delete</p>	<p>Deletes the selected pages.</p> <p>You can select pages in different documents.</p> <div style="border: 1px solid gray; padding: 5px;">  <p>Caution</p> <p>After you delete a page, document, or folder, the modified batch structure is saved to the server immediately and cannot be reverted.</p> </div>







2.4 Changing the Page View







When you select a page, the **Page View** panel displays the scanned image of this page with the default scaling and original page orientation (portrait or landscape). You can adjust the displayed image in the panel with the following operations.

2.4.1 Zooming and Rotating Pages

 **Note:** An image saved after a PDF rotation, is not in PDF format. It is a *JPEG* image contained in a *PDF* wrapper.

Action	Icon/Tooltip	Description
Fit the page height in the pane	 <p>Fit Height</p>	Fit the page height to the viewing pane.
Fit page in the pane	 <p>Fit Page</p>	Fit the page height and width to the viewing pane.
Fit the page width in the pane	 <p>Fit Width</p>	Fit the page width to the viewing pane.
Drag the image	N/A	Pan the image by dragging the image with the cursor or using the scrollbars.

Action	Icon/Tooltip	Description
Automatically focus on a field in the Page View pane that corresponds to the current field on the Form panel (Completion) or Index Fields panel (Identification)	<p>Auto Pan</p>  <p>CTRL + 5</p> <p>Auto Pan</p>	<p>Activates or deactivates automatic panning.</p> <p>For more information, see “Automatic Panning” on page 28.</p> <p> Note: In Identification, automatic panning is not available for information extraction projects.</p>
Open the image in a separate window (which could be on another monitor)	<p>Pop out</p>  <p>Pop Out</p>	<p>Pop out the page view into a separate window (which could be on another monitor).</p> <p> Note: Closing the window also returns it to the Page View pane.</p>
Set default zoom		<p>The default zoom for the Page View.</p> <p>Click the triangle to select the default zoom.</p> <p>To deactivate or activate default zoom, click the magnifying glass.</p> <p>You can also use Page > Default Zoom for Each Page and Page > Set Default Zoom to.</p> <p> Notes</p> <ul style="list-style-type: none"> • This default applies to other tasks and in other work sessions as well as the current one. • If the default zoom is not specified, then the last used zoom setting is used.


Action	Icon/Tooltip	Description
Zoom out/in		<p>Zoom the view in or out. You can also select a specific percentage for the view.</p> <p> Tip: To zoom an image quickly in 5% increments, position the cursor on the image and press and hold down CTRL and then scroll the mouse wheel. Zooming is centered on the mouse cursor.</p>
Rotate the image counterclockwise 45 degrees	 CTRL + 1	<p>Rotate counterclockwise 45 degrees.</p> <p> Caution If an image has highlighted image zones, they are not rotated with the image and start reflecting incorrect data. Use rubberbanding to define new image zones for index fields, or populate index fields with correct data manually.</p>
Rotate the image clockwise 45 degrees	 CTRL + 3	<p>Rotate clockwise 45 degrees.</p>
Rotate the image clockwise 180 degrees	 CTRL + 0	<p>Rotate 180 degrees clockwise.</p>

2.4.2 Zooming into the Image Area

In addition to the standard image zooming in the **Page View** panel, you can benefit from zooming into the required image area. The zoomed part of the image appears in the **Page View** panel in the full screen mode. During field indexing, the zoomed area behaves similar to the original image. In particular, it displays the highlighted zones for the selected fields and allows you to **rubberband** image values.

Based on your desired outcome, perform the steps in the following table:

Table 2-2: Zooming the Image Area

To Do This	Perform These Steps
Zoom the selected image area to the full screen	<ol style="list-style-type: none"> 1. Draw a rectangular area on the image with the mouse cursor, keeping SHIFT and the secondary (right) mouse button pressed. 2. Release the mouse button to view the selected area zoomed to the full screen.
Move the zoomed area	<ol style="list-style-type: none"> 1. Click inside the zoomed area. 2. Drag the zoomed area with the mouse, keeping the primary mouse button pressed, then release the mouse button. Or, keep CTRL pressed and use the arrow buttons to move the zoomed area: 
Resize the zoomed area	<p>Put the mouse cursor over one of the four edges or borders. Drag the corners or borders of the zoomed area with the mouse.</p> <p>Alternatively, resize the zoomed area using the CTRL+PLUS and CTRL+MINUS key combinations.</p>
Minimize the zoomed area back to its actual size	Double-click inside of the Page View panel that displays the zoomed area in the full screen mode.

2.4.3 Automatic Panning

Automatic panning allows you to speed up the validation of index values in a document as follows:

- When you jump into the populated field in the **Form** panel (Completion) or **Index Fields** panel (Identification), the image is automatically panned to show the image zone with the value displayed in that field. The focused image zone is highlighted in color. Thus, you are focused to the value on the image every time you select an indexed field in the panel.
- In Completion, when a document includes multiple pages, the fields in the form can be populated from image zones located on different pages (images). When you set focus on a field that has a zone on a different image, the application switches to that image automatically.





Note: When you select a field that has no image zone, **Auto Pan** can automatically select a different image that contains data related to the currently selected field. This optional capability of **Auto Pan** is based on field grouping. If the fields in the data entry form are not configured to form groups, this capability is not available.

Related Topics:

[“Shortcuts and Arrow Keys for Moving Around the Page” on page 89](#)

2.5 Assigning Templates (Identification Only)

If the **Template not assigned**  status is displayed on a page, then you should classify the page by assigning a template to it. Once a template is assigned to a page, it changes to the **Completed**  status (and is shaded in green).

You can finish a task if all pages in the **Documents** panel are **Completed** or flagged (if enabled by your administrator).

You classify pages as follows:

- **Manual assignment:** You assign a template to each page individually. Where applicable, you can optimize the task processing by applying a template to a group of pages.
- **Auto-assign a sequence of templates:** You process documents in which their pages are known in their number and content. You can use this mode permanently, or enable/disable it as an option for any document in a task. Disabling the **Auto-assign a sequence of templates** mode switches you to manual assignment. You can always manually change template assignment for individual pages.



Note: Auto-assigning templates does not apply to information extraction projects.

2.5.1 Assigning a Template to a Page

In **manual assignment mode**, you need to manually assign a template to every yellow (“classification needed”) page in the **Documents** panel. For each page, you need to select an appropriate template from the **Template List** panel.

Depending on the application settings, **Template List** panel can display the **Template Name** and **Code** columns, or the **Code** column only. In the first case, you select templates by name. In the second case, the template names are hidden; you select a group of templates by code, and the template that fits best is selected from this group by Identification automatically.



Note: You cannot select multiple pages in the **Documents** list and assign them all with a template selected from the **Template List** panel. However, if the template list displays the **Template Name** column, Identification remembers the name of the last used template. This template can be assigned to a group of pages.

To assign a template to a page:

1. Select a page in the **Documents** panel.

To select multiple pages, click each one with the mouse, keeping **CTRL** or **SHIFT** pressed.





Note: Assigning a template to multiple pages requires specific permission.

To help you select a template for a page, the **Template List** panel indicates the best candidates marked with an icon:

Table 2-3: Template Icons and Statuses

Icon	Template status	Description	Recommended steps
<confidence rate>%	Recommended	Indicates the template with the high confidence rate (in %).	If a given page has recommended templates, the Template List panel shows the <N> recommended message. <ol style="list-style-type: none">1. Click the Show recommended button to show only recommended templates and hide the rest.2. Click Show All to remove the filter.


Icon	Template status	Description	Recommended steps
"Favorite" ("star")	Recently used	Indicates the recently used template. Identification remembers up to five recently used templates in the scope of the current task.	<p>You can sort the list of templates to show the most recently used templates on top, ordered alphabetically, followed by the rest of templates, also ordered alphabetically. If a recommended template becomes recently used, it is still marked with the "confidence rate" icon; however, it appears on top as a recently used template.</p> <p> Note: This option is not provided if the Template List panel shows the Code column only.</p> <p>1. To show the recently used templates on top, expand the Template List panel settings and select Most recently used first.</p> <p> Note: This filter can be activated in the application settings, in which case you will see this option selected</p>

Icon	Template status	Description	Recommended steps
			automatically. 2. Uncheck the option to remove the filter.
"Checked"	Assigned	Indicates the template assigned to the currently displayed page.	If you assign a recommended or a recently used template, this template changes its icon to "checked". If you assign a different template to the page, the given template gets back its "favorite" icon (if recently used) or its confidence rate (if recommended, or recommended and recently used).

- (Optional) To narrow the search, configure the **Template List** panel to show only the templates related to the document type or template code of the current document. Other templates will be hidden. To set this filter, click the settings list and select **Filter templates by current document type** or **Filter templates by current template code** (whichever is available). If the parent document is not assigned a document type or a template code yet, the **Template List** panel displays all templates.



Note: This filter can be activated in the application settings, in which case you will see this option selected automatically.


- (Optional) To filter on a template name or code, perform one of the following:
 - To filter on text anywhere in a template name or code, type the text in the **Start typing to filter** field.
 - To filter on text with which the template name or code must start, select template list settings  > **Search items that begin with entered text** and then type the text in the **Start typing to filter** field. Your administrator might have already set this option.



Notes

- If the **Template Name** column exists, then it is filtered; otherwise, the **Code** column is filtered.

- Filtering is case-insensitive.
 - Wildcards are not supported.
- (Optional) To sort the templates alphabetically in an ascending or descending order, click the arrow icon in any column header. Scroll the list to find the template, or move the focus to this template using the **UP** and **DOWN** arrow keys.
 - To assign the selected template to a page, double-click it or press **ENTER**. The assigned template gets “checked” in the **Template List** panel. The filter box displays the template name or code. The template name appears on the page node in the **Documents** panel.

 **Note:** If the document is not yet assigned a document type or template code, assigning the first template to any page of the document automatically assigns the document type or template code. The document type or code appears on the document node in the **Documents** panel.


- You could also click the **Assign Last Template** button in the **Template** toolbar above the displayed page:



Or, select **Template > Assign Last Template** from the menu, or use the command shortcut key.

The last manually selected template will be assigned to all selected pages, irrespective of their classification status. The data in the index fields will be extracted automatically.

The last used template is saved within a task and can be automatically assigned to any page or multiple pages selected in the **Documents** panel. You can select multiple pages in a document or in the task and assign the last used template to all of them with a single command.

 **Note:** If you apply the **Assign Last Template** command to a document or a higher-level node selected in the **Documents** panel, the last used template is assigned to the first page under the selected node.

Assigning the last used template is not available if the **Template List** panel includes template codes only, that is, if the **Template Name** column is hidden and only the **Code** column is displayed.

- You could also click the **Assign Template to Rest** button in the **Template** toolbar above the displayed page:



Or, select **Template > Assign Template to Rest** from the menu, or use the command shortcut key.

The selected template will be assigned to the selected page and all remaining pages within one document, irrespective of the page status. The index fields specific for each page are extracted automatically.

8. (Optional) The **Template List** panel can optionally include templates with the “separator” marker for classifying pages with separator barcodes. A separator barcode on a page indicates the beginning of a new document. In a general case, a task comes to you for processing with all separator barcodes recognized, separator templates applied, and all documents split accordingly.

If you find a page with a separator barcode not on the first position in the document, you can assign it a separator template manually. Once done, the document is split automatically in the **Documents** panel. The page classified as a separator starts a new document.



Note: Splitting a document with a separator template does not require permission for manual splitting and merging in the **Documents** panel.

9. (Optional) If the assigned template defines any index values, they appear in the **Index Fields** panel populated with extracted values. If the values are extracted with an acceptable confidence rate and do not require confirmation, the page is classified and its status changes to DONE (green shading).

If the page is still IN ERROR (yellow shading), verify the page values in the **Index Fields** panel. The focus is automatically set to each field that requires attention.

10. (Optional) If you see the **dark corner and the question mark** on a classified page in the **Documents** panel (tree view mode), make sure the assigned template belongs to the document type or template code currently assigned to the parent document. This requirement is not strict and the task can be finished with a classification conflict. Reassign the template if necessary.



Note: To avoid classification conflicts, consider adjusting the **Template List** panel to filter templates by document type or template code.

Related Topics:

[“Resolving Classification Conflicts \(Identification Only\)” on page 36](#)

[“Validating Fields in Identification” on page 38](#)

2.5.2 Assigning Templates Automatically

When classifying pages in a multi-page task, you have an option to automatically assign a sequence of templates to all pages in a document. The **Auto-assign a sequence of templates** option serves to speed up the classification of a document whose pages are known in their number and content. A loan application may serve as an example of such documents.

When the **Auto-assign a sequence of templates** option is enabled, you only need to assign a document type or a template code (whichever is configured as a classifier) to the document in the **Documents** panel. The templates associated with the document type or code will be assigned to all document pages automatically in a sequence – the first template is assigned to the first page, the second template is assigned to the second page, and so on. If the number of pages in a document exceeds the number of templates associated with the document type or code, the last used template is assigned to the rest of the document pages automatically.

Your application can be configured to run with the **Auto-assign a sequence of templates** option enabled by default. Besides, you can enable and disable this option for particular documents and tasks when necessary. To enable template assignment in a sequence, expand the list of settings in the **Template List** panel and check the **Auto-assign a sequence of templates** option. If you uncheck this option, the application works as described in [“Assigning a Template to a Page” on page 29](#).

To classify a document with templates in a sequence:

1. Select the document in the **Documents** panel.
2. Verify the order of pages and their correct orientation.
3. Click the link in the document bar to expand the list of document types or template codes (whichever is configured). The list is configured to show up to five most recently used items on top and all other items ordered alphabetically.
4. Select the required document type or template code from the list:
 1. To filter the list dynamically, start typing the name of the document type or template code in the filter box. The filter is case insensitive.
 2. Use the arrow keys to move up and down the list. Press **ENTER** to choose the selected item.
 3. (Optional) Confirm your choice in a prompt dialog box. If the prompt dialog box is suppressed in the application configuration, this step is skipped.

The selected document type or template code appears in the document bar. All pages in the document are assigned automatically, including pages that were classified before. In the **Documents** panel, each assigned page displays the template name. If the assigned templates define index fields, data is extracted from the page images automatically.

5. To complete the classification, verify the data fields for each page of the document. The focus will be set on each extracted field in the document

automatically. In each focused field, press **ENTER** to confirm the populated value, or enter the correct value and confirm.


After a document has been classified automatically, you can make any necessary corrections and adjustments manually. In particular, you can assign the last manually selected template to a group of selected pages or to the rest of the document.

Related Topics:

[“Assigning a Template to a Page” on page 29](#)

[“Assigning Templates Automatically” on page 35](#)

2.6 Resolving Classification Conflicts (Identification Only)

 **Note:** Templates are not available for information extraction projects.

After a page has been assigned a template or moved to a different position in the **Documents** panel, you may see that page marked with a dark corner with a question mark. This icon indicates that the classified page conflicts with other classified pages in a document.



Figure 2-1: Identification classification conflict

Classification conflicts do not block the task from being finished. The dark corners are intended to help you notice a possible classification mistake and resolve it.

Case 1: A page must be assigned a template belonging to the document type or template code of the document

When you classify a page with a template that belongs to a document type or template code other than assigned to the parent document, this event causes the classification conflict and the classified page is marked with the dark corner. The same conflict occurs when you copy or move a classified page to a document whose document type or template code does not indicate the page template. To resolve the conflict, reclassify the page with the template compliant with the document type or template code of the document. Consider enabling the **Filter templates by current document type** or **Filter templates by current template code** option (whichever is available in the **Template List** settings) to avoid classification conflicts in the future.

Case 2: A page classified as a separator must be on the first position in the document

When a separator template is applied to a page located not in the first position in the document, this assignment splits the document into two. However, when moved from the first position to a different position in any document, a page classified with a separator template does not split that document. Instead, this event causes the classification conflict and the separator page is marked with the dark corner:

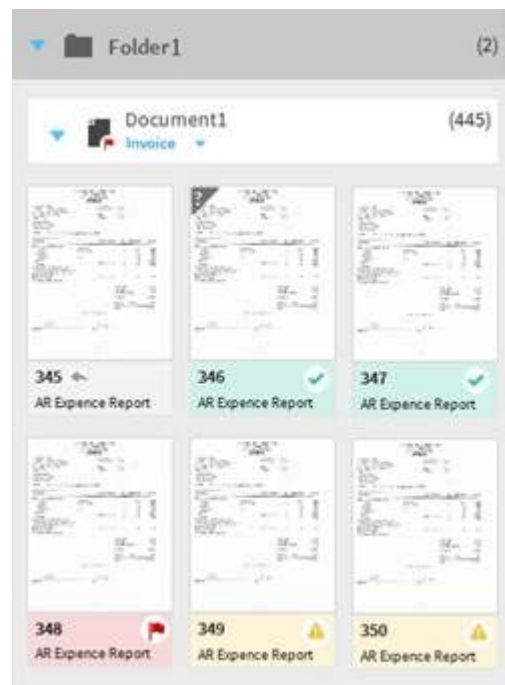


Figure 2-2: Page classified as separator

To resolve the conflict, either split the document manually by the separator page, or reassign the separator template to the page.

2.7 Validating Fields in Identification



Note: Indexing is not available for information extraction projects.

If a page has been assigned a template but still has yellow shading and displays the “attention” icon (status: IN ERROR) in the **Documents** panel, then manual index field validation is a required step. Once the page has been assigned a template, the focus is automatically set to the first field in the **Index Fields** panel that requires attention.

When you move the focus to a field, a small image snippet appears near the field, helping you to validate the extracted value against the image data. Image snippets are optional. If they are enabled, you can switch them on and off by selecting the **View > Image Snippets** menu option.

To validate fields on the page:

1. Depending on the content that you view in the focused field, do the following:

Table 2-4:

Field content	Cause	Action
The value in the field looks correct	The field requires manual confirmation.	Press ENTER to confirm the field.
The value in the field includes “?” marks instead of some characters.	The field includes low-confidence characters denoted by “?”.	Set the focus in the field and fix the low-confidence characters .
The value in the field is incorrect, or the field is blank	The data extraction failed.	Use the option that suits best: <ul style="list-style-type: none"> • Select the value in the field and do the editing. • Set the focus on the field and rubberband the image value. • If an image snippet appears near the selected field, type the displayed value into the field.

2. After all errors in the field are corrected, press **ENTER** to move focus to the next field that requires attention. Pressing **TAB** moves focus to the next field in the tab order, regardless of whether the field requires correction.

When all index fields are valid, the page shading changes to green and the “checked” icon (status: DONE) appears on the page bar or thumbnail in the **Documents** panel.

2.8 Validating Data in Completion

This section describes using Completion to validate data. Identification also provides some data validation. For more information, see [“Validating Fields in Identification” on page 38](#).

2.8.1 Validating Fields

During validation, you view validation errors and fix incorrect fields or characters. When you receive work that requires character or field validation, the cursor is placed in the first field that requires validation.

You can validate fields in any preferred order, navigate between them manually, and quickly find any field with a particular field label or data. When the cursor is in a field, a small image snippet appears near the field, helping you to validate the extracted value against the image data.




Note: Image snippets are optional. If they are enabled, you can switch them on and off by selecting the **View > Image Snippets** menu option.

To fix problems with characters or fields:

1. Move the focus to the field that requires attention, the message bar displays an error message or warning to indicate the issue and the required action. If the field contains multiple problems, the first error encountered is displayed initially.
2. Depending on the reported issue and the content in the focused field, do the following:

Table 2-5:

Field content	Cause	Action
The value in the field looks correct.	The field requires manual confirmation.	Press ENTER to confirm the field.
The value in the field includes “?” marks instead of some characters.	The field includes low-confidence characters denoted by “?”.	Set the focus in the field and fix the low-confidence characters .

Field content	Cause	Action
<p>The value in the field differs from the image value, or the field is blank.</p>	<p>The data extraction failed.</p>	<p>Use the option that suits best:</p> <ul style="list-style-type: none"> • Select the value in the field and do the editing. • Set the focus on the field and rubberband the image value. • If an image snippet appears near the selected field, type the displayed value into the field. • If multiple fields in the Form panel show the same issue, consider changing the document type. <p>Depending on how your designer has configured fields with a drop-down value list, you could be provided with assistance in the following ways:</p> <ul style="list-style-type: none"> • When you first start typing in the field, the drop-down list is automatically expanded. • As you type in a string, the first value in the drop-down list that matches the string is selected. Matching criteria is as follows: <ol style="list-style-type: none"> 1. A value in the list has a matching string at the beginning. 2. A value in the list has a matching string anywhere. <p> Note: Only one of these matching criterion could be applied or both of them could be applied in the given sequence.</p>

Field content	Cause	Action
The field has a validation error (incorrect format, violated business rule, or other) or is flagged.	For the exact cause, see the message area at the bottom of the Page View panel.	Correct the value in the field, or flag the field if applicable.

- After all errors in the field are corrected, press **ENTER** to move the focus to the next field that requires attention. Pressing **TAB** moves the focus to the next field in the tab order, regardless of whether the field requires correction.

When all fields are valid, the “attention” (yellow triangle) icon disappears from the document in the **Documents** panel.

2.8.1.1 Fixing Low-Confidence Characters

If an index field has one or more low-confidence characters, they are denoted by the “?” (question) mark. Moving the focus to this field activates the character repair mode to help you repair all low-confidence characters with minimum effort. Character repair mode works as follows:

- The first low-confidence character is selected automatically. Type the correct character that will replace the “?” mark automatically.



Note: The question mark may be a correct character in particular fields. If the field is configured to accept the question mark as a valid character, you can press **ENTER** to confirm it.

- The focus then moves to the next low-confidence character, selecting it automatically for rapid repair.
- After you have corrected all low-confidence characters for a field, normal mode is activated automatically. The focus remains in the field if it still contains invalid data. Otherwise, the focus moves automatically to the next field that requires attention.

For example, if the field should contain the value “Insurance” but the actual text is “In?ur?nce”, the first “?” is selected initially. After you replace that character with an “s”, then the selection moves to the second “?” for correction.

To exit the character repair mode before correcting the low-confidence characters in a field, do any of the following:

- Press **ESC** to select the entire field.
- Press the arrow keys to move the cursor to the left or right of the low-confidence character.
- Click with the mouse to set the cursor position.

2.8.1.2 Editing Text Fields

Editing index fields includes standard cut, copy, paste, and delete actions. A subset of editing commands is displayed on the context menu when a field is focused.

To edit the value in the field:

1. Navigate to the text field that you want to edit, then select the text. Use the following key sequences to select text in the field:
2. Do any of the following:
 - To cut text from a field, select **Edit > Cut**.
 - To copy field text to the Clipboard, select **Edit > Copy**.
 - To paste text from the Clipboard, select **Edit > Paste**. Pasting replaces any currently selected text. If nothing is selected, the text is pasted at the location of the cursor.
 - To delete selected text in a field, select **Edit > Delete**, or press ` (backtick on U.S. keyboards) to instantly clear all text in the selected field.
 - To undo changes in a text field, including replacing text that has been cut, select **Edit > Undo**. You can undo changes only to the last field you edited.
3. If the field requires confirmation, press **ENTER** to confirm the field data and continue.

2.8.2 Table Data

The **Form** panel can display table data for the selected document. Depending on the quality of the table data, you might need to edit the table, extract table data using *OCR*, or both.

Standard *table editing* functionality lets you edit table data like any other data field – correct values, confirm missing data, or fix broken data. You can perform these tasks cell-by-cell as you work your way through the table. It might also be necessary to edit the table structure by inserting missing rows, deleting unnecessary rows, moving rows that were manually inserted in the wrong order, or merging data in a row with that in the previous row.

Unless otherwise noted, you can perform standard table editing operations using either **grid view** or **record view**. Grid view displays data using a standard table layout, with columns and rows. Record view displays table data in a format that either more closely resembles the actual image or makes it easier to enter and review data.

If table data was not extracted correctly from a page, you can recapture the data most efficiently using the *table extraction* mode. This mode lets you quickly capture table data in a page and clean up any structural issues with the table before saving the results to the data entry form.

The topics included in this section describe the operations that you can perform to correct and validate data in tables.

 **Note:** To be able to work with table data in Completion, the Advanced Recognition license is required.

2.8.2.1 Adjusting the Table View

Tables in the **Form** panel can be adjusted to display data using either of the following views:

- *Grid View:* Displays data using a standard table layout, with columns and rows. This view provides a row selection column along the left border of the table that lets you select multiple contiguous rows for deleting or moving using standard range selection keys (**CTRL**+click or **SHIFT**+click). Grid view is useful if, for example, you are comparing the rows in an invoice and you want to add all the amounts in a single column to ensure they equal the total. The tabular format of grid view facilitates this process.
- *Record view:* Displays table data in a format that either more closely resembles the actual image or makes it easier to enter and review data. In this view, controls and fields are laid out in a format that is similar to non-table data. Record view is useful if, for example, the table in the data entry form contains so many columns that you would need to scroll in grid view to see the right-most columns.

Toggle between grid and record table views using the appropriate option on the **Table** menu.

2.8.2.2 Editing Tables


Each time you enter data in the placeholder row, a new blank row is added to the bottom of the table. In addition, you can insert or delete rows in a table where necessary, move table rows to a different position, merge table rows, and clear all data in the table.

Depending on the desired outcome, perform the required action as described in the table to follow.

Table 2-6: Inserting and Deleting Table Rows

To Do This	Perform These Steps
Insert a row in a table	<ol style="list-style-type: none"> 1. Click inside the row above which you want to insert a new empty row. 2. Select Table > Insert Row.
Delete one or more rows from a table	<ol style="list-style-type: none"> 1. Click inside the row that you want to delete. You can select multiple rows using the row selection column. 2. Select Table > Delete Row.

To Do This	Perform These Steps
Restore the deleted rows	If you delete table rows in error, you can undo the delete action by selecting Edit > Undo . You must select Undo immediately after deleting the rows.
Clear a table	Clearing the table deletes all table rows on all pages, including any data. Only the blank placeholder row remains. After you clear the table, you can then extract the table data again. <ol style="list-style-type: none">1. Click inside any row of the table.2. Select Table > Delete All Rows. Only the blank placeholder row remains.
Move table rows	If a row was manually inserted in the wrong order in a table, you can move it up or down until it is in the correct position. You can select multiple rows using the row selection column. <ol style="list-style-type: none">1. Select one or more rows to move using the row selection column.2. Select Table > Move Row Up or Move Row Down, as desired.

To Do This	Perform These Steps
Merge table rows	<p>Table extraction mode extracts one row for each line of text on the image. If a logical table row consists of multiple lines of text, you must manually merge the rows in the data entry form after exiting table extraction mode.</p> <ol style="list-style-type: none"> 1. Select Table > Grid View. 2. If necessary, clear incorrectly read values. 3. Click inside the row below the one with which you want to merge. 4. Select Table > Merge with Previous Row. <p>After you merge rows, the combined row contains all of the text. The appearance of the combined text in this row depends on how the designer configured the data entry form. If the field supports multiple lines of text, then the combined text is separated by a line break (carriage return) and the value for each non-blank field appears on a different line in the row. Otherwise, the values are separated by a space.</p> <p> Tip: If you are performing post-extraction cleanup for tables and combining logical rows is the only correction required, it is faster to group the rows in table extraction mode rather than manually merging the rows using the following steps.</p>

2.8.3 Extracting Table Data

Table extraction is a separate mode that lets you quickly capture table data in an image by rubberbanding (drawing the bounds of) the table and each column. You can recapture the contents of an entire table if the data was not captured correctly during automatic extraction. You can also extract specific columns that contain missing or incomplete data.

2.8.3.1 Table Extraction Mode

When you work in table extraction mode, the **Form** panel is replaced by a **Table Extraction** panel and the image view is set to table extraction mode. In this mode, only the **Page View** and **Table Extraction** panels are available. The **Form** and **Summary** panels are hidden and the command bar, page navigator, and status bars are disabled. Navigation within the **Documents** panel is also disabled.

Table cells are selectable to allow you to clear the cell data or draw column bounds. However, because table extraction mode is designed to allow operators to quickly capture table data rather than perform field validation, cell data cannot be edited in this mode.

The first step in extracting data is to draw table and column bounds to identify the data to be extracted. Table bounds automatically define the top and bottom of each column; horizontal column bounds must be drawn manually.

Default table and column bounds are displayed on the image if automatic extraction was previously performed on the table or you extracted the same table from a previous page in the same document. Resize handles appear at the corners of the table and the column with focus. Adjust the existing table and column bounds, as necessary, by dragging the resize handles. Alternatively, you can redefine columns by redrawing them using the secondary mouse button. Resizing or moving the table automatically adjusts the top and bottom of each column bound. Resizing or moving the column adjusts the left or right edge of the table if the selected column is the left- or right-most column.

As you define each column in the image, focus automatically advances to the next column in the grid. This feature lets you rapidly draw all the column bounds in succession without having to select each column manually. If you need to move focus back to the previous column, click **SHIFT+TAB**. If a column does not need to be extracted, skip the column by pressing the **TAB** key.

When you extract data from a page, it is placed in a temporary table in the **Table Extraction** panel. Extracted data for the current page is saved in the main data entry form when you save and exit table extraction mode or save and move to the next page in the document. Newly-extracted data is always inserted as new rows in the main data entry form, above the row with focus.

After you exit table extraction mode, any validation rules defined for the document type run against the newly extracted data. If validation errors exist, the appropriate data-entry mode is automatically activated based on the type of field correction required. Correct any *OCR* or other errors in the table cells just as you would any other field.

2.8.3.2 High-level Steps for Extracting Table Data

To enter the table extraction mode, click the table and select **Table > Extract Table** from the menu, or open the context menu using the secondary mouse button and select **Extract Table**. Perform the following high-level steps to extract table data from a page:

1. Define the bounds of the table.
2. Define the position of each column in the table.
3. Extract the contents of the table to a temporary table.
4. If necessary, clean up the structure of the temporary table before saving the extraction results to the data entry form.
5. Save the extraction results for the current page as new rows in the data entry form and either move to the next page or exit table extraction mode.

When you exit table extraction mode, any validation rules defined for the document type run against the newly-extracted data. Correct *OCR* and other validation errors as you would for any other field.

2.8.3.3 Common Extraction Scenarios

The following table describes a few common scenarios that you may encounter when extracting table data as well as the high-level steps for handling them.

Table 2-7: Steps for Handling Common Extraction Scenarios

Scenario	Steps
Row text is split across pages	If a logical row is split across pages, merge the rows manually after extracting the data on each page. Or, use table extraction mode to capture the first page, key the missing values from the second logical line (on the second page), then use table extraction again to capture the remaining rows on the second page.
Row text spans multiple lines	If the layout of the logical row spans multiple rows in the table, combine the text from all rows into the first (top) line of the row by grouping related rows .
Row text overlaps multiple columns	When the row text for two or more columns overlaps on the image, the extraction process inserts the overlapping text into each of the columns. Clear the unwanted data for each column using the DELETE key while in table extraction mode. Then group related rows to generate a single logical row from multiple rows.

2.8.3.4 Extracting Tables

When you extract table data from a page, the newly-extracted data is always inserted above the row with focus. To ensure that extracted data is added in the correct location in the temporary table, do the following:

- To replace existing row data, **delete** the desired rows in the data entry form. Then place the cursor in the row above which you want to insert the newly-extracted data before entering table extraction mode.
- To insert newly-extracted data on the first page of a document, **delete** all the rows on page 1 in the data entry form. Then place the cursor in the first row on page 2 before entering table extraction mode.
- To insert newly-extracted data on the last page of a document, place the cursor in the placeholder row before entering table extraction mode.

To extract table data:

1. If you need to recapture data that was previously extracted, delete the existing rows for the current page in the data entry form. Otherwise, skip to the next step.
2. Place the cursor in the table cell or row above which you want to insert the newly-extracted data. If you are recapturing data, click the first incorrectly-positioned or missing cell in the table that appears in the image.
3. Enter table extraction mode by selecting **Table > Extract Table**. You can also click the table using the secondary mouse button and select **Extract Table** from the context menu.

If the form table has focus, then only **Extract Table** is enabled. The menu bar is disabled after the operator enters the table extraction mode.

4. If table and column bounds already exist, you can adjust them by dragging the resize handles using the primary mouse button. Alternatively, you can redefine columns by redrawing them. Redrawing a column automatically advances to the next column while resizing requires that you advance manually.
5. If no bounds exist, do the following:
 - a. Draw the boundaries of the table by dragging the secondary mouse button to draw a rectangle around the entire table. When you release the mouse button, table bounds with resize handles appear on the image.
 - b. The first column in the table is selected automatically. To skip to a different column, click the cell in the desired column.
 - c. Define the horizontal boundary of the selected column by dragging the secondary mouse button between any two points on the left and right edges of the column. As you drag the mouse, the application displays a box that represents the column bounds. Releasing the mouse button saves the current bounds and moves focus to the next column automatically.

6. Continue to adjust or draw bounds for each column that appears in the image. To skip to the next column in the temporary table, press **TAB** or click the cell in the desired column.
7. After all columns have been defined, click **Extract** to extract the table data from the page. The extraction process rereads the table and places the extracted data into the temporary table you are viewing. New rows replace any in the temporary table.
8. If necessary, **clean up the extraction results**.
9. Complete the page as follows:
 - If you are finished extracting table data for the current document, click **Save and Close**. The application inserts the extracted rows into the data entry form above the row with focus (the row you selected in step 2) and exits table extraction mode. The first cell of the first newly-added row receives focus.
 - If the table is continued on the next page of the document, click **Save and Next Page**. The application inserts the extracted rows into the data entry form above the row with focus (the row you selected in step 2), clears the temporary grid, and displays the next page. Resize the default table and column bounds that were carried over from the previous page, if necessary, and extract data from the new page.

2.8.3.5 Cleaning up the Extraction Results

After extraction, it might be necessary to clean up the extraction results to correct any structural problems such as overlapping column data. This problem occurs when the row text for two or more columns overlaps on the image. Because the application cannot determine which values belong in which column when they overlap, the extraction process inserts the overlapping text into each of the columns. Clear the unwanted data for each column before exiting table extraction mode.

For example, if the text in the **Part Number** and **Description** columns overlap, remove descriptions from the **Part Number** column and part numbers from the **Description** column. After clearing the unwanted data, you can **combine the rows** in each column to generate a single logical row from multiple rows.



Note: Column corrections can only be made to rows that were extracted for the current page using table extraction mode. Any other operations, such as **merging individual rows** or rows that span two pages, require that you first exit table extraction mode.

To clean up the extraction results:

1. In table extraction mode, select a rectangular region of table cells in the temporary table.
2. Clear the unwanted data in the selected cells using the **DELETE** key.

3. Repeat steps 1-2 until all unwanted text is removed.
4. **Group related rows.**

Grouping Related Rows

Table extraction mode extracts one row for each line of text on the image. If the row text spans multiple lines on the page, the table in the data entry form includes one row for each of the lines. Although you could merge individual sets of rows, it is more efficient to group all the related rows in the table at once. Grouping related rows merges the text from all related rows into a single row for the group. Text is always merged into the first (top) line of the row, which is considered the *primary row* in a multi-line table row.



Note: If you want to merge related row text into a row other than the first row, exit extraction mode and **merge the rows** manually after optionally **cleaning up the extraction results**.

To group related rows in table extraction mode, you must choose a column as the model for grouping the rows. Any column in which the row values occupy a single line can be used. For example, in the table below, you could choose any column other than **Item** because only the text in the **Item** column spans multiple lines. Each time table extraction mode encounters a row with a value in the selected column, it creates a new row. When it encounters an empty cell in the selected column, it merges that row with the previous row.

For example, assume you selected the **Order** column as your grouping column in the following table. Only the first and fourth rows would be retained as primary rows because the **Order** column contains values in these rows (**3** and **1**, respectively). All other rows would be merged with the previous primary row and the rows in which **Order** was empty would be removed from the table.

Table 2-8: Before Grouping Table Rows

Order	Shipped	B.O.	Item	Price	Total
3	3	0	0001121560	50.70/EA	152.10
			CHT403-0428		
			BUSHING ADAPTER		
1	1	0	0001114795	570.22/EA	570.22
			CHC403- 1140		
			VOLTAGE DETECTOR / 69KV		

After grouping related rows based on the **Order** column, the resulting table would look like this if the field supports multiple lines of text:

Table 2-9: After Grouping Table Rows

Order	Shipped	B.O.	Item	Price	Total
3	3	0	0001121560 CHT403-0428 BUSHING ADAPTER	50.70/EA	152.10
1	1	0	0001114795 CHC403-114 VOLTAGE DETECTOR / 69KV	570.22/EA	570.22

If the table includes multi-line rows above all the primary rows, they are combined with the first primary row in the table.

To group rows:

1. In table extraction mode, click the **Group Rows By** button.
2. On the **Grouping column** popup window, choose the column on which you want to group rows. The window lists each column in the grid that contains data after extraction.



Tip: Select any column in which the value is the first line of text in the logical row and does not span more than one line.

2.8.4 Changing the Document Type

A document type determines the set of document fields that appear in the **Form** panel when validating a document of this type. Typically, when you receive a task, all documents in the **Documents** panel display the name of the document type. If the document type is not identified, the document bar shows the **Choose type** button. If you click the name of the document type or on this button, the pick list of document types appears, allowing you to quickly change the document type for the given document.



Note: To be able to change the document type, you must be granted permission. If the **Document** menu displays the **Choose Type** menu command, you have this permission granted.

If the fields displayed in the **Form** panel for a given document do not match the fields displayed on the document pages (images), the document type is detected incorrectly. Select a different document type from the list and apply it to the document.

To change a document type:

1. In the **Documents** panel, select the document that requires a different document type.

2. Select **Document > Choose Type** or click the link in the selected document bar.
The pick list of document types appears. The list is filtered to show up to five recently used items on top and all other items ordered alphabetically. The currently selected document type is selected.
3. Select the required document type from the list:
 - To filter the list dynamically, start typing the name of the document type in the filter box. The filter is case insensitive.
 - Use the arrow keys to move up and down the list. Press **ENTER** to select the item.
4. Click **OK**.
5. (Optional) Confirm your choice in a prompt dialog box. If the prompt dialog box is suppressed in the application configuration, this step is skipped.

The name of the selected document type appears in the document bar. Changing a document type discards existing index data. The fields in the **Form** panel are cleared and cannot be populated with new data automatically. After you change the document type, either key data from the image manually or finish the task so that the document can be routed to classification/extraction, depending on your business process.

2.9 Directly populating fields with data from the image



Note: For Identification, indexing is not available for information extraction projects.

You can use the Click to Extract feature or basic rubberbanding to directly populate fields with data from the image. In comparison to basic rubberbanding, Click to Extract provides additional functionality. For example, using Click to Extract, you can automatically populate the current field with a single click of a word; in addition, the name of the current field and other useful information is displayed when the pointer is positioned over a word. However, Click to Extract requires the person in your organization who created the CaptureFlow to enable it, whereas basic rubberbanding is available by default.

2.9.1 Click to Extract

To populate fields with data (such as amounts, dates, and entire words as well as individual characters) directly from the image, place the cursor in a field and then perform any of the following actions:

- Click the data.
- Drag over the data.
- To multiselect or clear entire words, perform one of the following actions:
 - **SHIFT**+click each word.
 - **SHIFT**+drag over the words.
- To select or clear individual characters, use one of the following:
 - **CTRL**+click each character.
 - **CTRL**+drag over the characters.

If the value is valid for the field, then the focus is automatically moved to the next field that requires attention.



Tip: To pan the image, drag a blank area of the image.



Notes


- Make sure that **Page > Click to Extract** is enabled.
- The person in your organization who created the CaptureFlow must have enabled Click to Extract.
- The **Click to Extract** feature is available for information extraction projects.
- When you position the pointer over the data on the image, a tooltip (including the field name, data to be copied, and validation error (if applicable) is displayed.

2.9.2 Basic Rubberbanding

Basic rubberbanding allows you to draw a zone around the image value with a mouse, after which this value immediately appears in the index field. If you use a **zoomed image area** in the **Page View** panel, you can rubberband values from that area as well.

To enter data using rubberbanding:

1. Set the focus on the field in which you want to enter the extracted data.
2. In the **Page View** panel, keep the secondary mouse button pressed and draw a rectangle around the value in the image. When you release the mouse button, the text extracted from the image is inserted into the field with focus, replacing any text already in the field.

 **Note:** Rubberbanding requires a particular OCR engine to be installed on your machine. If rubberbanding does not work in your application, contact your administrator.

Related Topics:

[“Zooming into the Image Area” on page 27](#)

2.10 Flagging Documents, Pages, or Fields With Reasons

Flags represent an additional type of status for documents, pages, and fields. For example, a flag set on a document could indicate that the document must be rejected or forwarded to a specialist for reprocessing.

Your administrator must have enabled flagging and defined a collection of document, page, and field flags that are particular to the business needs of your organization. In addition, your administrator could have specified that flagged pages, documents, or both do not need to be classified to complete the task. If flagging is set up, then the **Flag** buttons in the **Documents** panel and in the **Page View** panel are displayed; for example, as shown in the following Identification window:








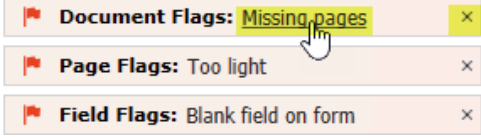
Figure 2-3: Identification flag button

Notes

- Field flags are available in Completion only.
- For Identification:
 - If your application is configured for work in **Do not classify flagged pages on page 64** mode, flagging a page is necessary when you have difficulties classifying it. This scenario allows you to finish a task in which all pages are either classified or flagged. If you flag a page, the flagged icon appears on it in the **Documents** panel but the page status remains the same as before flagging.
 - If the **Do not classify flagged pages on page 64** option is enabled, flagging a document excludes all of its pages from classification. When you finish the task, flagged documents are not verified.

2.10.1 Applying and Removing Flags

Icon/tooltip/keyboard shortcut	Action and tips
<p>Flag</p>  <p>CTRL + G</p> <p>CTRL+G</p> <p>Page > Flag</p> <p>Document > Flag</p>	<p>Displays the Reason for Flagging dialog box where you apply and remove the appropriate flags for the selected field, pages, or a document.</p> <p>The flagged page or document is marked with a flag icon  in the Documents panel.</p> <p>If a flag's checkbox is filled with a black square , then that flag exists on only a subset of the selected pages. To remove the flag from that subset of pages, click the checkbox; you could then reapply the flag to all of the selected pages by selecting the flag again.</p> <p> Tips</p> <ul style="list-style-type: none"> • Keyboard shortcuts are displayed next to the flagging reasons. • Positioning the pointer over the flag icon displays the flagging reasons that have been applied. • Flagging reasons are displayed in page view for the displayed page and to its parent document and the field with the focus. <p> Notes</p> <ul style="list-style-type: none"> • If a page flag is applied to a document, then the selected page in that document is flagged instead. • If a document flag is applied to a page, then the parent document is flagged instead. • If only one flag is available, then applying the flag results in the following: <ul style="list-style-type: none"> – In Completion, the Reason for Flagging dialog box is not displayed and the flag is automatically applied or removed; however, in Identification, you might still be prompted to apply or remove the flag. – If the flag does not exist on any of the selected pages or exists on only a subset of them, then the

Icon/tooltip/keyboard shortcut	Action and tips
	<p>flag is applied to the rest of the selected pages.</p> <ul style="list-style-type: none"> – If the flag exists on all selected pages, then the flag is removed from all of them.
<p>Flag messages in the page view panel</p> 	<p>Messages about flagged fields, pages, or documents are displayed in page view. You can perform the following actions:</p> <ul style="list-style-type: none"> • Click the flag reason link to display the Reason for Flagging dialog box where you select and remove the appropriate flags for the flagged field, pages, or a document. • To clear all page, document, or field flags, click the X icon for the corresponding flagged pages, documents, or fields.

2.10.2 Applying Flags in Page Mode (Completion Only)

When Completion works in the page mode, the main window displays the **Reasons for Flagging** panel with a collection of page flags. If the page is flagged, the message area at the bottom of the **Page View** panel displays the list of applied flagging reasons. The **Reasons for Flagging** panel displays the applied flagging reasons checked and shows them in the selected message in the status bar at the bottom.

Table 2-10: Flagging a page in page mode

To Do This	Perform These Steps
Move the focus to the Reasons for Flagging panel	Select the panel with a mouse, or press CTRL +G .
Check/ clear the flagging reason	<p>Do any of the following:</p> <ul style="list-style-type: none"> • Click the flagging reason with a mouse. • Navigate through the list with the DOWN arrow key and press SPACE on the flagging reason. • If the Reason for Flagging panel displays a character near each flagging reason, press the specified character on the keyboard.
Clear all flagging reasons	Click Clear All , or press DEL .

2.11 Annotating Pages With Auxiliary Information

Pages in a task can be annotated with graphical and/or textual information. Annotations are not part of the image. They are laid over the image to add some auxiliary information, mark image areas, and hide sensitive information on the image. When you annotate a page, the annotations are sent to the server immediately.

Depending on the permissions granted, you can:

- View existing annotations only
- Add new annotations; view, edit, and delete the existing annotations

Viewing annotations does not require special permissions. If a page has annotations applied, they are displayed on the image in the **Page View** panel and on the page thumbnail in the **Documents** panel.


If you need to add and edit annotations, you must be granted permission to work in the annotation mode. If you have this permission, you can view the **Annotate** button in the **Page View** panel. Clicking this button loads the **Annotations** panel and allows you to annotate pages in the task and edit the existing annotations.

2.11.1 Types of Annotations

The **Annotations** panel provides a collection of annotation types with default properties. The following types of annotations can be viewed and applied on the image:

Table 2-11: Annotations Palette: Annotation Types

Annotation Type	Description
Redact	A rectangular area on the image. Is generally used to hide sensitive information.
Highlight	A rectangular area on the image. Is generally used to highlight and attract visual focus to a specific area.
Arrow	A line on the image. The line style can be configured, including the line cap (endpoint), color, and thickness.

Annotation Type	Description
Stamp	<p>A selected image (a stamp) placed on the page. The stamp file can be picked from the list of recently selected images, or you can browse for an image file.</p> <p> Note: A stamp image must be opaque and can have any format, compression, and color depth. Transparent stamps are not supported and, if applied, appear in the image viewer as black opaque rectangular stamps.</p>
Text	The specified text overlaid on the image.
Comment	<p>The specified text added on the image as a popup comment. Comment annotations display when you position your pointer over the annotation.</p> <p>An icon displays on the image to identify the location of the popup comment. The comment icon is for visual purposes only and is not saved with the image.</p>

2.11.2 Adding Annotations

To be able to annotate images in the **Page View** panel, click the **Annotate** button or select **Page > Annotate** from the menu bar. This command enables the annotation mode and docks the **Annotations** panel in the main window. This panel has the palette from which you can select the annotation type, and a property sheet where you can configure the properties of the added annotation.

To add an annotation:

1. Select the page in the **Documents** panel and display it in the **Page View** panel. Or, work with the displayed page.
2. Select the annotation icon from the palette.
3. (Optional) Adjust the annotation properties in the property sheet. The set of available properties varies depending on the annotation type.

Table 2-12: Annotation Types: Available Properties

Property	Description	Annotation Types					
		Redact	Highlight	Arrow	Stamp	Text	Comment
Line or Border Color	Color used for lines and borders		X	X		X	

Property	Description	Annotation Types					
		Redact	Highlight	Arrow	Stamp	Text	Comment
Line Styles and Endpoint Styles	Line styles such as solid or dotted; endpoint styles such as plain or arrows		X	X		X	
Line Thicknesses	Line weights		X	X		X	
Background Color	Background color used in the annotation	X	X			X	
Background Image	Image file used as the annotation				X		
Background Opacity	Percentage of opacity for the background color or image		X			X	
Popup Comment	Text that displays in a popup window when mousing over the image	X	X				X
Overlay Text	Text that is overlaid on the image					X	

Property	Description	Annotation Types					
		Redact	Highlight	Arrow	Stamp	Text	Comment
Text Color	Color of the annotation text					X	
Font Style and Emphasis	Available font styles and emphasis, including bold, italic, and underline					X	
Font Size	Available font sizes					X	
Text Direction	Orientation of the text					X	

4. Add the annotation to the page by dragging the secondary mouse button in the desired location on the image.
5. Adjust the annotation size or location on the page as necessary. To resize the annotation, select it and drag a corner. To relocate, drag the annotation with a mouse.

The **Annotations** panel indicates that you are working in the annotation mode. If you stay in this mode, all page operations remain available, except you cannot move the image with a mouse in the **Page View** panel. Instead, you can use a mouse to drag and resize annotations on the image. To return to the normal mode, close the **Annotations** panel by clicking the **Close (X)** icon in the panel corner.

2.11.3 Editing Annotations

You can edit placed annotations by changing their properties, size, and location on the image. To be able to edit annotations, enable the annotation mode by clicking the **Annotate** button or select **Page > Annotate** from the menu bar.

To edit an annotation:

1. Select the annotation you need to edit. You can either click the annotation in the image displayed in the **Page View** panel, or you can use the navigation arrows on the **Annotations** palette to advance through the annotations in order.

Navigate back through annotations by repeatedly clicking the **UP** arrow. As you navigate forward or backward through the annotations, the annotation with focus is selected and centered on the **Page View** panel. The **Annotations (#)** count in the property sheet indicates which annotation currently has focus on the page.

2. Modify the annotation as necessary, selecting from available annotation **properties**. Clicking on an available property applies the change to the selected annotation.
3. Adjust the annotation size or location on the page as necessary. To resize the annotation, select it and drag a corner. To move the annotation, drag it with a mouse.

2.11.4 Copying Annotations

You can copy an existing annotation and paste it on the same or a different page. The copy assumes the same property values as the annotation you copied. To copy and paste annotations, enable the annotation mode by clicking the **Annotate** button or selecting **Page > Annotate** from the menu bar.

To copy an annotation:

1. Select the annotation that you want to copy, then select **Edit > Copy**.
2. On the destination page, select **Edit > Paste**. The annotation is placed at the center of the destination page and can be moved or modified as necessary.

2.12 Finishing Tasks

- Completion

If the task includes no more work items that require attention, then you can finish it.


- Identification

If the task includes no more pages that require attention, then you can finish it.

When you finish the task, the status of all pages is verified. If all conditions are met, then the task is accepted and sent to the server. Otherwise, the task remains in the main window and a message related to unfinished work items is displayed.

For more information, see “[Classification Mode Conditions Required for Task Completion \(Identification Only\)](#)” on page 63.

To finish the task:

1. Click .
2. If prompted, then confirm that the task has been completed as follows:

- Completion

If work is finished, then you can exit the waiting window and select more work in the **Get Work** window; otherwise, the main window displays the new task for processing.

- Identification

If the completed task is accepted, then the main window displays the new task for processing. If the task still has unclassified pages, then an error message indicates the work items that are remaining.





Note: If you do not want to be prompted every time you finish a task, then uncheck **View > Prompt at > End of Task**.

Classification Mode Conditions Required for Task Completion (Identification Only)

Depending on the classification mode used in your application, find the conditions for a task to be verified in the following table. To find out which classification mode is used, see your administrator.

Table 2-13:

Classification mode	Conditions for a task to be completed	Documents panel (nodes)
Classify All Pages	All pages in the task must be classified.	All pages must be gray (“no processing required”) or green (“done”). No pages can be yellow.
Do Not Classify Flagged Pages	All pages in the task must be either flagged or classified.	All pages must be gray (“no processing required”), or green (“done”), or red (“flagged”). No pages can be yellow.
Do Not Classify Pages in a Flagged Document  Note: Can be enabled with any mode.	All documents without a flag must have their pages processed as required by the actual classification mode. Pages in flagged documents are not verified and can be in any status.	Pages must be the color acceptable for the actual classification mode. All pages in flagged documents are ignored; furthermore, they are flagged with the “Document is flagged” reason and colored red (“skipped from classification”).
Allow Task Finish With Unclassified Pages  Note: Can be enabled with any mode.	A task can be finished in any state.	Pages can be any color.

2.13 Deferring Tasks

To postpone the current task and proceed to the next one, send the current task back to the server. The returned task is moved to the task queue. When all preceding tasks have left the queue, your postponed task is resent for processing to another operator.

To re-queue a task:

1. Click .

(Identification Only) If the task has been reassembled either by deleting or moving pages, or by template separators, or by binding fields, or if pages have been rotated or annotated, all changes are saved on the server automatically. The notification appears in the message box.

2. Perform one of the following actions:
 - Completion

Depending on your permission for abandoning changes, you can see one of the following options:

- The notification appears in the message box to inform you that all task changes will be saved on the server automatically. You have no permission to abandon changes in the task after its tree structure has been modified or any of its pages have been rotated or annotated. Choose the preferred action:
 - **Save changes:** The task will be sent to the queue with all changes made.
 - **Cancel:** Return to the current work to continue processing.
- The prompt dialog box opens to let you save or abandon changes in the task. Choose the preferred option in the prompt dialog box:
 - **Save changes:** The task will be sent to the queue with all changes made. When the next operator receives the task for processing, they will view all changes.
 - **Abandon changes:** The task will be sent to the queue without applied flags, changed document types, indexed values, and others. However, changes that result in a modified task structure or rotated or annotated pages are saved to the server immediately. You cannot abandon these changes with this option. When the next operator receives the task for processing, they will view these “immediate” changes.
 - **Cancel:** Return to the current work to continue processing.



Note: If you do not see any of these options, the task is returned to the server with all changes saved.

- Identification

(Optional) If the task was not reassembled and pages were not rotated or annotated, you have an option to save or abandon changes. Choose the preferred option in the prompt dialog box:

- **Save changes:** The task will be sent to the queue with all changes made, such as applied templates, indexed values, and others. When the next operator receives the task for processing, they will see all changes.
- **Abandon changes:** The task will be sent to the queue without changes.
- **Cancel:** Return to the current task and continue processing.



Note: If you still do not see the prompt dialog box, the task is re-queued with abandoned changes by default.

2.14 Stopping Work


When you take a break or finish work at the end of the day, you should stop working in the module. When you stop working, all work assigned to you (all batches or a particular batch) is cancelled. You stop receiving tasks and are redirected to the **Get Work** window. The current task is returned to the server and redirected to a different operator.

To stop work:

1. Click .



Note: The following changes are automatically saved to the server and cannot be reverted:

- Completion
 - Rotated or annotated pages.
 - Modifications to the task structure, such as the deletion or moving of pages and the splitting, merging, cutting, or copying of nodes.
 - Identification
 - Rotated or annotated pages.
 - Reassembly of the task such as the deletion or moving of pages (manually or through template separators or binding fields).
2. (Optional) You are prompted to perform one of the following actions:
 - Completion
 - **Save changes:** The task is saved to the server with all changes made. When the next operator receives the task for processing, they can see all of these changes.
 - **Abandon changes:** The task is saved to the server without changes.
 -  **Note:** If any of the changes in step **Step 1** were made, then you cannot abandon changes.
 - **Cancel:** Return to the current work.
 - Identification
 - **Save changes:** The task is saved to the queue with all changes made, such as applied templates, indexed values, and others. When the next operator receives the task for processing, they can see all of these changes.
 - **Abandon changes:** The task is saved to the queue without changes.



Note: If any of the changes in step **Step 1** were made, then you cannot abandon changes.

- **Cancel:** Return to the current task.

Chapter 3

Reference

3.1 Changing the Main Window Layout

You can adjust the view and behavior of the main window as described in the following table.










 **Note:** Some of the **View** menu options can be unavailable if the respective capability is not enabled in the application configuration settings. For more information, contact your administrator.

Table 3-1: Changing the Main Window Layout

To Do This	Perform These Steps	Visual Effect and Notes
Resize a panel	Move the cursor to the panel edge and drag it to the desired width or height, keeping the primary mouse button pressed. Release the mouse button.	The panel is enlarged or reduced. The neighbor panel is reduced or enlarged, accordingly.
Display/hide the Documents panel	Click the “arrow” icon located on the right panel edge.	The Documents panel is displayed or collapsed.
Display the Page View panel in a different window	Select the View > Float Page View menu option. Alternatively, click the Pop out button in the Page View toolbar.	The Page View panel appears in a separate window. The Page View window displays the panel toolbar and works exactly as the Page View panel. The Page View window can be used in a different monitor.
Dock the Page View window back to the main window	Select the View > Dock Page View menu option. Alternatively, click the Pop out button in the Page View toolbar.	The Page View panel appears in the main window.
(Identification only) Make the Template Image panel floating	Select the View > Float Template Preview menu option.	The Template Image panel becomes hidden and appears when you move the mouse cursor over it.
(Identification only) Dock the Template Image panel	Select the View > Dock Template Preview menu option.	The Template Image panel is displayed in the main window.

To Do This	Perform These Steps	Visual Effect and Notes
Show/hide image snippets	Select the View > Show Image Snippets menu option.	<p>The image snippets that appear near the validation fields in the Form panel (Completion) or Index Fields panel (Identification) are allowed or suppressed.</p> <p> Note: This menu option can be grayed out, indicating that you have no permission to change the default configuration.</p>
Show/hide the Documents panel toolbar	Select/remove selection from the View > Toolbar for Documents menu option.	The buttons above the Documents panel appears or disappear.
Show/hide the Page View panel toolbar	Select/remove selection from the View > Toolbar for Page View menu option.	The buttons above the Page View panel appears or disappear.
Show/hide shortcuts on the panel toolbars	Select/remove selection from the View > Show Toolbar Shortcuts menu option.	The shortcuts under the buttons in the Documents panel and Page View panel appear or disappear.
Show or suppress the prompt dialog when proceeding to the next document	Select or clear View > Prompt at >End of Document .	<p> Note: This menu option can be grayed out, indicating that you have no permission to change the default configuration.</p>
Show or suppress the prompt dialog when finishing the task and proceeding to the next one	Select or clear View > Prompt at > End of Task .	<p> Note: This menu option can be grayed out, indicating that you have no permission to change the default configuration.</p>
Show or suppress the prompt dialog when deleting a page	Select or clear View > Prompt at > Delete Page .	<p> Note: Selecting Don't show again in the delete confirmation dialog box also clears the menu item.</p>
Show or suppress the prompt dialog when deleting a document	Select or clear View > Prompt at > Delete Document .	<p> Note: Selecting Don't show again in the delete confirmation dialog box also clears the menu item.</p>


To Do This	Perform These Steps	Visual Effect and Notes
Show or suppress the prompt dialog when deleting a folder	Select or clear View > Prompt at > Delete Folder .	 Note: Selecting Don't show again in the delete confirmation dialog box also clears the menu item.
(Completion only) Display the Form panel at the right side of the Page View panel	Select the View > Form on Right menu option.	<p>The layout of the main window is changed to display the Form panel, the message bar, and the Summary panel docked to the right edge of the window.</p>  Note: This menu option can be grayed out, indicating that you have no permission to change the default configuration.
(Completion only) Display the Form panel at the bottom of the Page View panel	Select the View > Form on Bottom menu option.	<p>The layout of the main window is changed to display the Form panel docked to the bottom edge of the window.</p>  Note: This menu option can be grayed out, indicating that you have no permission to change the default configuration.
(Completion only) Display/ hide the Summary panel	Select the View > Summary menu option.	The Summary panel appears or disappears, respectively.
(Completion only) Enable/ disable resizing the message bar height	Select the View > Resizable Message Bar menu option.	Enables or disables the ability to resize the height of the message bar. If resizing is disabled, then message bar height is automatically adjusted to fit the content. If resizing is enabled, then the user could manually adjust the message bar height. If only some of the content can be displayed, then a scroll bar is displayed. Also, the height is saved and restored for the user's next session.

3.2 Changing the Documents Panel Layout

When processing a task, you can view its hierarchical structure in the **Documents** panel.


In Identification, you can switch between the following display modes to perform different operations:


- **Tree View:** Displays the task as a multilevel structure in which pages constitute the lowest level, followed by documents and higher levels (if available). Pages are displayed as thumbnails. The tree view displays all task levels.
- **Page List:** Displays the task as a list of documents, each including the list of pages. Levels above documents (if any) are hidden. In this mode, you can view values of the **binding field**.

 **Note:** **Page List View** is not available for information extraction projects.

You can adjust the view of the task in the **Documents** panel as described in the following table.

Table 3-2: Adjusting the Documents Panel


To Do This	Perform These Steps
Expand or collapse all nodes above the page level	<p>Do any of the following:</p> <ul style="list-style-type: none"> • Double-click any document in the Documents panel. • Select View > Collapse All Documents or View > Expand All Documents from the menu. • Press F9. <p>When expanded, the Documents panel displays all pages. When collapsed, the page level is hidden.</p>
Expand or collapse a particular node above the page level	<p>Click the “arrow” icon on the node to expand or collapse it. When expanded, the node displays all child nodes on all levels, including pages.</p>
(Identification Only) Switch between the display modes	<p>Click the respective icon in the Documents panel header:</p> 

To Do This	Perform These Steps
Increase or decrease the thumbnail size	<p>This operation is available in the tree view mode only.</p>  <ol style="list-style-type: none"> 1. Click the “settings” icon on the Documents panel header. 2. Adjust the thumbnail size to the required values. <p>The updated thumbnail size is remembered in the user preferences and applies to all next tasks, including in the next work sessions.</p>
Hide levels above the selected one	<p>This operation is available in the tree view mode only.</p> <ol style="list-style-type: none"> 1. Click the “settings” icon on the Documents panel header. 2. Expand the Show levels up to list and choose the highest level to be displayed in the tree view. <p>The levels above will be hidden.</p>

3.2.1 Tree View Mode (Identification Only)

In the tree view mode, the task is displayed as a tree structure where pages are shown as thumbnails and the higher-level nodes are shown as horizontal tabs.

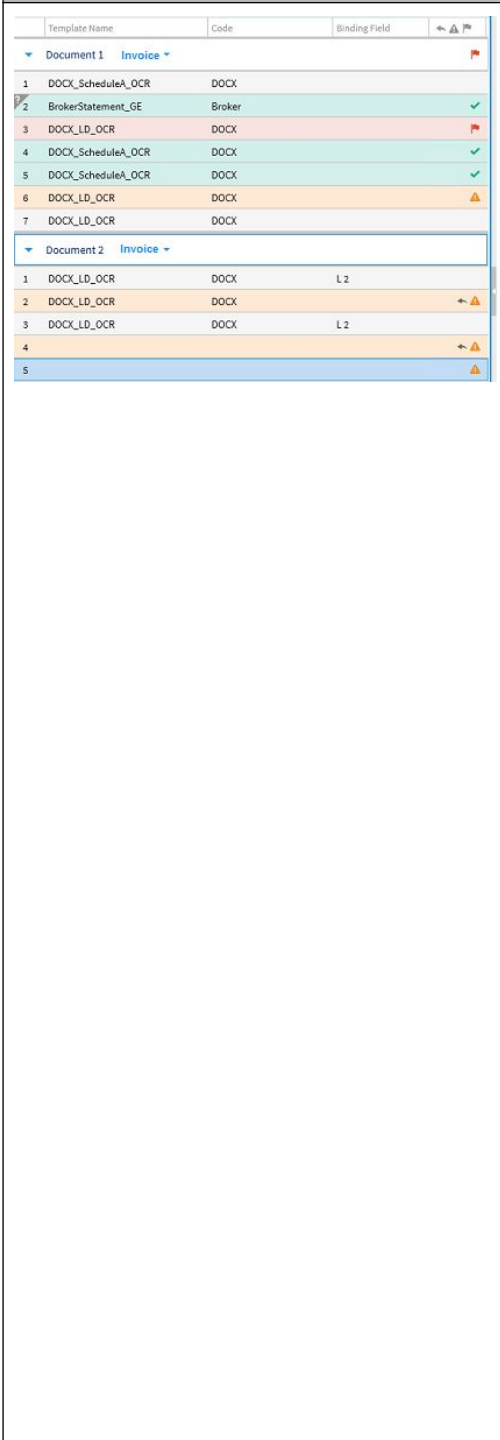

Table 3-3:

Tree View Mode	Description
<p>The screenshot shows a tree view with the following structure:</p> <ul style="list-style-type: none"> Folder 1 (Stack 1) (2) <ul style="list-style-type: none"> Document 1 (Invoice) (7) <ul style="list-style-type: none"> 1 DOCX_ScheduleA_OCR 2 BrokerStatement_GE 3 DOCX_LD_OCR 4 DOCX_ScheduleA_OCR 5 DOCX_ScheduleA_OCR 6 DOCX_LD_OCR 7 DOCX_LD_OCR Document 2 (Invoice) (5) <ul style="list-style-type: none"> 1 DOCX_LD_OCR 2 DOCX_LD_OCR 3 DOCX_LD_OCR 4 DOCX_LD_OCR 	<p>Every page shows its ordinal number in the document. If you replace the page, its ordinal number will be recalculated.</p> <p>Nodes above the page level display:</p> <ul style="list-style-type: none"> • “Arrow” icon that indicates the expanded node (“down”) or collapsed node (“right”). Click the “arrow” icon to expand or collapse the node. When expanded, the node displays all child nodes on all levels, including pages. • A self-descriptive label (for example, Document, Folder, and so on) and the ordinal number of the node within the parent node (for example, Document1, Folder2). <p> Note: You can see different node labels defined by your administrator.</p> <ul style="list-style-type: none"> • The number of included child nodes in braces. For example, Document1 (7) means that the first document in the given folder (or in the task with no folder level) includes seven pages. <p>The classification status of pages and higher-level nodes is indicated by icons and color shading. Besides:</p> <ul style="list-style-type: none"> • Each classified page shows the name of the assigned template, for example, DOCX_LD_OCR. • Each classified document shows the name of the assigned document type or template code is displayed near the “down” icon. The “down” icon on each document expands the list of document types or template codes (whichever is configured).

3.2.2 Page List Mode (Identification Only)

In the page list mode, the task is displayed as a list that can include document nodes and page nodes only. Nodes above the document level are hidden. To view all nodes, you can switch to the **tree view mode**.



Table 3-4:



List Mode	Description
	<p>Each page node displays the following data:</p> <ul style="list-style-type: none"> • The ordinal number of the page in the document. If you replace or move the page, its ordinal number will be recalculated. • Template name: Classified pages show the name of the assigned template, for example, DOCX_LD_OCR. Pages that are not classified show empty space. If template names are not displayed (hidden), page classification can be done by template codes only. • Code: Classified pages show the code of the assigned template, for example, DOCX. Pages that are not classified show empty space. • Binding Field: Classified pages show the value of the binding field if the assigned template has this field. If the binding field is not displayed (hidden), the automatic page binding is disabled. • “Backside” icon: Optional. If visible, shows the “backside” icon for page backside pages and nothing for front-side pages. • Page statuses displayed as icons. <p>Each document node displays the following data:</p> <ul style="list-style-type: none"> • “Arrow” icon that indicates the expanded (“down”) or collapsed (“right”) document. Click the “arrow” icon to expand or collapse the document. When expanded, the document displays the included pages. • The self-descriptive label (for example, Document) and the ordinal number of the document within the parent node. <p> Note: You can see a different label defined by your administrator.</p> <ul style="list-style-type: none"> • If the document is classified, the name of the assigned document type or template code appears near the “down” icon. The “down” icon on each document expands the list of document types or template codes (whichever is configured).

List Mode	Description
	<ul style="list-style-type: none"> If the document is flagged, its status is indicated by the “flag” icon.

3.3 Printing

 **Note:** If you do not see the **Print** menu commands, then you do not have permissions to print.

To Print	Perform These Steps
All pages in a task	Select Document > Print and then select All in Page Range .
All pages in a document or node	<p>Select a document or node in the Documents panel and then select Document > Print.</p> <p> Note: The Selection option is selected; however, the Selection option does not determine the pages that are to be printed. The pages to be printed are the ones that are selected in the Documents panel as follows:</p> <ul style="list-style-type: none"> All pages in the selected document or node, or The pages that are selected.
Selected pages	<p>Select pages in the Documents panel (CTRL+click, SHIFT+click) and then select Document > Print.</p> <p> Note: The Selection option is selected; however, the Selection option does not determine the pages that are to be printed. The pages to be printed are the ones that are selected in the Documents panel as follows:</p> <ul style="list-style-type: none"> All pages in the selected document or node, or The pages that are selected.

To Print	Perform These Steps
The current page	<p>Select a page in the Documents panel and then select Document > Print.</p> <p> Notes</p> <ul style="list-style-type: none"> • The Current Page option, which means that the current page is to be printed, is selected. • Selecting Page > Print chooses the print dialog box options that match the selections in the Documents panel; that is, it does not automatically select the current page for printing.
Pages by a range of page numbers	<p>In the Print dialog box, specify the range of pages in Page Range. Pages are numbered in the sequence as displayed in the Documents pane, beginning with the top left page; document and node breaks do not restart page numbering.</p> <p> Note: (Completion Only) If a document has a page filter, then only the pages shown in the Documents panel can be printed.</p>

3.4 Keyboard Shortcuts

This section describes the supported keyboard shortcuts.

3.4.1 Default Keyboard Shortcuts




The following keyboard shortcut defaults are provided to make processing tasks more efficient. These shortcuts primarily use **CTRL** and **FUNCTION** keys and can be used from anywhere in the application interface and are not limited to the active window or panel.


The default shortcuts can be customized and stored on the server as global options. For more information, see *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*.

The following table describes the default shortcuts assigned to each operation. Shortcuts for commands on secondary windows are not included in the list.

Table 3-5: Default Keyboard Shortcuts



Operation	Key	Description
Finish (icon)	F10	

Operation	Key	Description
Continue Later (icon)	F11	
Stop Working (icon)	F12	
Help (icon)	F1	
Navigate to Previous ():		
Back	CTRL+BACKSPACE	<p>Sets the focus on the closest previous page that requires classification or field validation. The focus is set either on the template list selection or on the first field that requires validation. Is disabled if there is no such page.</p> <p> Note: This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized.</p>
Previous Document	CTRL+U	Sets the first page of the previous document as current. If the page needs classification or field validation, the focus is set accordingly. Otherwise the focus is set on the page view. Is disabled if there is no previous document.
Previous Page	CTRL+SHIFT+J	Sets the previous page as current. If the page needs classification or field validation, the focus is set accordingly. Otherwise the focus is set on the page view. Is disabled if there is no previous page.
Previous Segment	CTRL+J	The focus moves to the first field in the previous segment.
Navigate to Next ():		

Operation	Key	Description
Next Work	RETURN	<p>Sets the focus on the closest next page that requires either classification or field validation. The focus is set either on the template list selection or on the first field that requires validation. Is disabled if there is no such page.</p> <p> Note: This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized.</p>
Set Focus to Form	F7	Sets the focus to the next form field that requires validation.
Next Document	CTRL+M	Sets the first page of the next document as current. If the page needs classification or validation, the focus is set accordingly. Otherwise the focus is on the page view. Is disabled if there is no next document.
Next Page	CTRL+SHIFT+K	Sets the next page as current. If the page needs classification or field validation, the focus is set accordingly. Otherwise the focus is set on the page view. Is disabled if there is no next page.
Next Segment	CTRL+K	The focus moves to the first field in the next segment.
Document menu:		
Flag	CTRL+G	
New Empty Documents	No default shortcut	
New Documents	CTRL+N	Applies to the current document or page only.

Operation	Key	Description
Split > Split Folder Split Folder up to Stack Split Folder up to Level4 Split Folder up to Level5 Split Folder up to Level6	F4	Applies to the current document only.
Change doc type	CTRL+D	Applies to the current document only.
Merge> Merge Folder Merge Stack Merge Level4 Merge Level5 Merge Level6	F3	Applies to the current document or page only.
Page menu:		
Zoom In	CTRL+PLUS CTRL+mouse wheel up	Applies to the current page only.
Zoom Out	CTRL+MINUS CTRL+mouse wheel down	Applies to the current page only.
Actual Size	CTRL+*	Applies to the current page only.
Fit to Window	No default shortcut	Applies to the current page only.
Fit to Width	No default shortcut	
Fit to Height	No default shortcut	
Default Zoom	No default shortcut	
Set Default Zoom to	No default shortcut	
Auto Pan	CTRL+5	Toggles automatic panning on/off.
Pan Up	CTRL+8	Applies to the current page only.
Pan Down	CTRL+2	Applies to the current page only.

Operation	Key	Description
Pan Left	CTRL+4	Applies to the current page only.
Pan Right	CTRL+6	
Rotate Left	CTRL+1	
Rotate Right	CTRL+3	
Rotate 180	CTRL+0	
Annotate	CTRL+T	Applies to the current page only.
Click to Extract	CTRL+E	Toggles populating index fields with data (such as amounts, dates, and entire words as well as individual characters) directly from the image by clicking on the data or drawing a selection rectangle around the data.
Table menu: (Completion only)		
Insert Row	CTRL+INSERT	
Delete Row	CTRL+DELETE	
Delete All Rows	CTRL+SHIFT+DELETE	
Move Row Up	No default shortcut	
Move Row Down	No default shortcut	
Merge with Previous Row	No default shortcut	
Extract Table	No default shortcut	
Grid View / Record View	No default shortcut	
Template menu: (Identification only)		
Assign Last Template	CTRL+SHIFT+Z	
Assign Template to Rest	CTRL+SHIFT+X	
Edit menu: all operations use standard Windows shortcuts		
.		
Undo	CTRL+Z	Reverts the change.
Cut	CTRL+X	Applies only to the selected text in the field.
Copy	CTRL+C	Applies only to the selected text in the field.
Paste	CTRL+V	Applies only to the selected text in the field.
View menu:		

Operation	Key	Description
Collapse All Documents	F9	
Expand All Documents		
Dock Page Preview	No default shortcut	
Float Page Preview	No default shortcut	
Dock Template Preview	No default shortcut	
Float Template Preview	No default shortcut	
Show Image Snippets	No default shortcut	
Toolbar for Documents	No default shortcut	
Toolbar for Page View	No default shortcut	
Show Toolbar Shortcuts	No default shortcut	
Prompt at > End of Document	No default shortcut	
Prompt at> End of Task	No default shortcut	
Prompt at> Delete Page	No default shortcut	
Prompt at> Delete Document	No default shortcut	
Prompt at> Delete Folder	No default shortcut	
Other operations:		
Find	CTRL+F	Sets the focus on the found field.  Note: This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized.
Print	CTRL+P	Launches the Print dialog for the current document.  Note: This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized.
Clear the text in the selected field	` (tilde)	

3.4.2 Shortcut for Switching Between Panels

To quickly switch between panels in the main window, you can use the following shortcut keys:

Table 3-6:

Target	Shortcut Key	Comment
Switch to the next or previous panel in the main window	CTRL+TAB (next) CTRL+SHIFT+TAB (previous)	
Switch to the next or previous control inside the active panel	TAB (next) SHIFT+TAB (previous)	
Switch to the Documents panel	Press ALT, 1 .	The focus is set to the page currently selected in the Page View panel.
Switch to the Page View panel	Press ALT, 2 .	
Switch to the Template panel	Press ALT, 3 .	Identification only
Switch to the Index Fields panel	Press ALT, 4 , or F7 (can be customized)	The focus is set to the first field in the Index Fields panel that requires attention.
Switch to the Summary panel	Press ALT, 6 .	Completion only
Switch to the Annotations panel	Press ALT, 5 .	
Switch to the Reasons for Flagging panel (page mode)	Press ALT, 7 .	Completion only

3.4.3 Shortcuts for Editing Text in Fields

To quickly edit text in fields, you can use the following shortcut keys:

Table 3-7: Editing Text in Index Fields: Keyboard Shortcuts

Key	Description	Example
LEFT	Move the cursor to the previous character. This character gets selected.	
RIGHT	Move the cursor to the next character. This character gets selected.	

Key	Description	Example
HOME	Move the cursor to the beginning of the field. The first character gets selected.	
END	Move the cursor to the end of the field. The last character gets selected.	
SHIFT+HOME	Move the cursor to the beginning of the field, selecting the text from the current position of the cursor to the beginning. The first character is included in the selection; the currently selected character is not included.	In the masked field "(123)45_ _ _ _", move the cursor to "5" (selected) and press SHIFT + HOME . "(123)4" is selected.
SHIFT+END	Move the cursor to the end of the field, selecting the text from the current position of the cursor up to the end. The current and the last characters are included in the selection.	
DEL	Delete the character next to the current position of the cursor. The deleted character is dropped rather than replaced by a space. The character next to the deleted one becomes selected.	In the masked field "(123)45_ _ _ _", move the cursor to "3" (selected) and press DEL . "4" is deleted, the field includes "(124)5_ _ _ _" ("4" is selected).
BACKSPACE	Delete the character prior to the current position of the cursor. The deleted character is dropped rather than replaced by a space. The character next to the deleted one becomes selected.	In the masked field "(123)456_ _ _ _", move the cursor to "4" (selected) and press BACKSPACE . "3" is deleted, the field shows "(124)56_ _ _ _", the cursor is set to "4" (selected).

3.4.4 Shortcuts for Navigating and Selecting Items in the Documents pane

To quickly navigate to and select items in the **Documents** panel, you can use the following shortcut keys:

Table 3-8: Navigating and Selecting Items in the Documents panel




To Do This	Perform These Steps	Comments
Navigate to a node in the Documents panel	<p>Use the following shortcuts:</p> <ul style="list-style-type: none"> • CTRL+HOME/END: Move the focus to the top/bottom tree node displayed in the Documents panel. • HOME/END: Move the focus to the first/last node inside the parent node. • UP/DOWN: Move the focus vertically to the upper/lower node through all currently expanded nodes. • LEFT/RIGHT: Move the focus to the left/right page in the document. 	The focus moves between the displayed nodes. The focused node gets <i>selected</i> . If a node is collapsed, its child nodes are bypassed. Expand the node to set the focus on its child node.
Expand or collapse a particular node (view or hide its child nodes)	<p>Double-click the node, or click the “arrow” icon on the node bar.</p> <p>Alternatively:</p> <ol style="list-style-type: none"> 1. Set the focus to the required document or a higher-level node. 2. Press LEFT to collapse the node and RIGHT to expand it (view all child nodes). 	
Expand or collapse all nodes (view or hide all pages in the task)	Press F9 .	

To Do This	Perform These Steps	Comments
Select a single node	Click the node. Alternatively: 1. Navigate to the node using shortcuts. 2. When the node is focused, press SPACE .	A page or a document becomes <i>selected</i> and <i>active</i> . A node above document level becomes <i>selected</i> .
Select multiple adjacent pages in one document	Keep the SHIFT key pressed and click the first and the last page in the range. Alternatively: 1. Set the focus to the first required page. 2. Keeping the SHIFT key pressed, move the focus to the last page in the selection.	All pages become <i>selected</i> . The last page in the selection becomes <i>active</i> .
Select multiple non-adjacent pages (including from different documents)	Keep CTRL pressed and click the required pages. Alternatively: 1. Set the focus to the first required page and press SPACE to select it. 2. Keeping CTRL pressed, move the focus to the next page and press SPACE to select it.	All pages become <i>selected</i> . The last page in the selection becomes <i>active</i> .
Expand the context menu for the selected node(s)	Click in the Documents panel with the secondary mouse button. Alternatively, press SHIFT +F10 .	

3.4.5 Shortcuts for Moving in the Form Panel (Completion Only)



You can easily move around within a data entry form during validation. When you receive work, the first field requiring attention takes focus. Navigate between the fields as described in the following table.

Table 3-9: Moving between Fields

To Do This	Perform These Steps
Move the focus to the next field in the tab order (regardless of whether the field requires correction)	Press TAB .
Navigate to the next work item	<p>Press ENTER or click  > Next Work. If the field requires confirmation, pressing ENTER confirms the field data.</p> <p> Notes</p> <ul style="list-style-type: none"> • If the field requires confirmation, pressing ENTER confirms the field data. • If the current field has a validation rule failure, this option cycles navigation through all the dependent fields once before proceeding to the next work item.
Navigate backwards through fields	<p>Click  > Back. The path leads backward through each field that was previously visited.</p>

To Do This	Perform These Steps
Find a field	<p>You can find a field in the Form panel by entering the field's label or the content in the field finder:</p> <ol style="list-style-type: none"> 1. Type the text to search for in the field finder text box, which appears on the command bar. The field finder is not case sensitive. 2. Press ENTER to find the first match. The finder identifies a match if either the field label or the field text contains the search term. The first match becomes the selected field. 3. Press ENTER again to find the next match. Cycle forward through all matches by pressing ENTER repeatedly. Press SHIFT+ENTER to search backwards through the document. 4. Press ESC to clear the search text and exit the field finder. The last matching field you viewed becomes the selected field.

The data entry form can optionally define segments (logical sections), which makes it easier for you to navigate through the long form. Related fields and tables are grouped together in screens that you can page through more quickly than scrolling through a single long form. Move between segments in a form as follows:

- To move to the next segment, click  **Next Segment**.
- To move to the previous segment, click  **> Previous Segment**.

The focus moves to the first field in the new segment.

3.4.6 Shortcuts and Arrow Keys for Moving Around the Page

You can use arrow keys and shortcut keys to move around the image quickly. You can use these shortcuts irrespective of the **Auto Pan** mode status (on/off). When the image is scaled to fit into the **Page View** panel, the shortcuts and arrow keys take no effect.

Menu command	Shortcut key	Arrow keys
Page > Pan Up	CTRL+8	
Page > Pan Down	CTRL+2	
Page > Pan Left	CTRL+4	
Page > Pan Right	CTRL+6	

For precise panning, click and hold the mouse button down on the image, then drag and release. For high-speed panning, use the shortcut keys. This method keeps the focus on the field. The shortcut keys pan at a preset distance per key.

Related Topics:

“Automatic Panning” on page 28

3.4.7 Windows Shortcuts

The following common Windows shortcuts execute the following operations:

Table 3-10: Standard Windows Shortcuts

Operation	Shortcut Key	Description
Apply	ENTER	Activates the component, or the component element that has the focus. For example, in Identification assigns the template currently selected in the Template list. Or, activates a common “commit” button. For example, activates the Apply button in the Reason for Flagging dialog.
Escape / Revert	ESC	Exit from the current mode (closing a dialog or exiting from edit mode) and revert any changes (if any made). In dialogs, this key is equivalent to clicking the Cancel button.

Operation	Shortcut Key	Description
Delete	DEL	Deletes the selected item. If applied is an editable field, deletes the character to the right of the cursor.
Activate	SPACE	Activates the component or the component element that has the focus. If the current control is a button, this key clicks the button. If the current control is a checkbox, this key toggles the checkbox. If the current control is an option, this key selects the option. Otherwise, works as the space key.
Next Control	TAB	Moves the focus to next control defined in the tab order. At end of the panel, returns the focus to the top.
Previous Control	SHIFT+TAB	Moves the focus to the previous control defined in the tab order. At the beginning of the panel, returns the focus to the bottom.
Next Panel	CTRL+TAB F6	Sets the focus to the next panel
Previous Panel	CTRL+SHIFT+TAB SHIFT+F6	Sets the focus to the previous panel
Home	HOME	If an editable field is selected, sets the cursor at the beginning of the field.
End	END	If an editable field is selected, sets the cursor at the end of the field.
Top	CTRL+HOME	Sets the focus to the top item.
Bottom	CTRL+END	Sets the focus to the bottom item.
Up	UP	Moves the focus and selection up by one line (if applicable, set focus to the first item of the line).

Operation	Shortcut Key	Description
Down	DOWN	Moves the focus and selection down by one line (if applicable, set focus to the first item of the line).
Expand / Right	RIGHT	In the tree view, expands the current selected node if not expanded; otherwise, goes to the first child node.
Collapse / Left	LEFT	In the tree view, collapses the current selected node if expanded; otherwise, goes to the parent node.
Context menu	SHIFT+F10	Calls the context menu for the focused element
Help	F1	Calls the help topic associated with the focused control . If not available, then calls general help.
Rename	F2	Selects the text in the edit box.
Refresh	F5	If there is a refreshable list or items on the currently focused panel, they are refreshed.
Copy	CTRL+C	Applies only to the selected text in the field.
Cut	CTRL+X	Applies only to the selected text in the field.
Paste	CTRL+V	Applies only to the selected text in the field.
Undo	CTRL+Z	Reverts the change.
Redo	CTRL+Y	Redoes the change.
Exit	ALT+F4	Exits the application. Before exit, changes are checked and the current task is stopped.
Close	CTRL+F4	Closes the current active document. Before closure, changes are checked and the current task is stopped.
Select All	CTRL+A	Selects all items in the tree view on the Document level (level 1). Does not work above this level.