

## OpenText™ Intelligent Capture

### **Web Client Guide**

This guide describes the Intelligent Capture Web Client, which provides an easy-to-use Web-based capture application to classify pages captured directly from a scanner (or from your computer).

ECPCORE220300-URE-EN-01

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## **OpenText™ Intelligent Capture**

### **Web Client Guide**

ECPCORE220300-URE-EN-01

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**This documentation has been created for OpenText™ Intelligent Capture CE 22.3.**

It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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# Chapter 1

## Overview

Intelligent Capture Web Client adds value to your document capture operations by providing an easy-to-use, Web-based capture application that you use to classify pages captured directly from a scanner (or from your computer) into the appropriate kind of document (for example, a loan application) and extract data (for example, a social security number) from them; after completing this processing, you can then send the documents and extracted data (also known as a *batch*) to the Intelligent Capture Server and then, optionally, onto a backend system.

By capturing documents closer to where they are received or created, organizations speed up document capture, reducing time-consuming and costly document shipping. For example, in a branch office an employee scans photos of the accident and attaches them to an insurance claim or attaches a signed page to a loan application. The employee can also import computer files (for example, files that were previously emailed to you). Some of the text on those pages is extracted and either automatically validated or manually validated by the employee. Then the employee submits the pages and extracted text together to the Intelligent Capture Server, which then routes them to your backend system for further processing.

### 1.1 Web Client Features

Intelligent Capture Web Client provides the following features:

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#### Captures information

- Captures paper documents from scanners and imports computer files.
- Improves image quality, cleans up images to improve image clarity and readability, and speeds up processing without manual intervention.
- Enhances images to improve recognition results.
- Enables organizing documents into logical groups; for example, when processing multiple loan applications, each applicant's documents can be organized under the loan number or their name.
- Enables rearranging pages within and between documents.

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#### Classifies information

- Identifies documents so that they are routed to the appropriate data extraction processes.
- Enables you to change document identification (also known as *Document Types*).

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### **Extracts information**

- Enables data extraction from identified documents.
- Performs optical or intelligent character recognition (OCR) to extract machine and handprint text using zonal OCR for structured documents.
- Reads bar codes to extract alphanumeric data.
- Ability to learn to extract data more accurately as you manually enter data for more documents of the same document type (also known as “machine-learning”)

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### **Assists with the review and correction of extracted information**

- Automatically identifies errors in extracted data.
  - Enables you to flag issues to fix in the future.
  - Enables you to copy data (such as amounts, dates, and entire words as well as individual characters) directly from an image to form validation fields with a single click, by multiselect, or by drawing a selection rectangle around the data.
  - Automatically highlights all valid numeric and date data (on the image) for an empty form validation field.
-

## Chapter 2

# Processing Documents

## 2.1 High-Level Procedure

1. In your browser, set your browser's language option to the language as instructed by your organization, navigate to the Intelligent Capture Web Client URL that your organization provided, and log in.



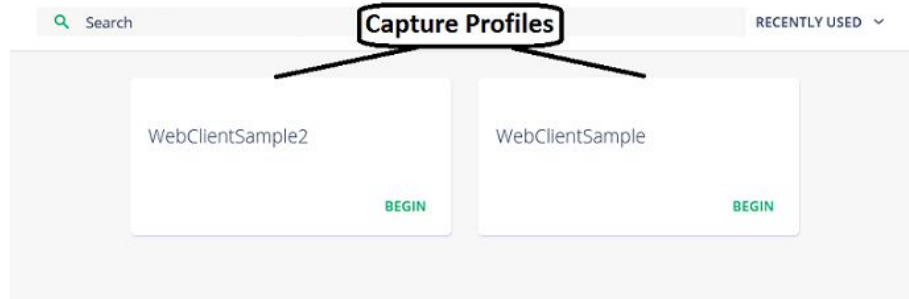
### Notes

- The maximum file size for both creating and processing a batch is 70 MB .
  - JavaScript must be enabled in your browser.
  - For operating system and browser requirements, see the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)).
  - The PixTools for Web runtime is required. If the PixTools for Web runtime is not installed or is the incorrect version, then you are prompted to download and install it.
  - If this is your first time logging into the Intelligent Capture Web Client from this computer, tips and other helpful information might be displayed.
  - For Windows single sign-on (SSO) authentication, Google Chrome and Microsoft Edge (Chromium based) are supported. You must use NTLM as the only provider (IIS > Authentication > Providers).
2. After logging in, you can either create batches or process existing ones according to the settings in a capture profile.

A batch consists of documents and extracted data.

A capture profile contains options for scanning paper documents and importing document image files. These options include scanner settings, image color choices, document assembly, batch settings, classification of pages as certain types of documents such as invoices and expense reports, and extraction of data from the pages such as dates and amounts.

- To create batches, click **Create batches** and run a capture profile by clicking **Begin** in the capture profile.



**Figure 2-1: Main capture process**

- To process existing batches, click **Process batches** and then perform one of the following:
  - Select a batch from the list.
  - Automatically get tasks and process them until no more are available by clicking **Auto Process**. During processing you have the opportunity to cancel auto processing and return to the **Process Batches** page.

 **Tips**

- You can search and sort the batch list by different batch attributes.
  - You can also filter the list by department by selecting the **Departments** drop-down list (if enabled by your organization).
3. Perform any of the following actions to prepare the batch for submission to the Intelligent Capture Server.

Instead of making all features available in a capture profile, a capture profile can be optimized for specific kinds of processing, such as scanning or reviewing extracted data. In these cases, only features that are useful in that kind of processing are available. Your organization might have made some or all of the following features available to you.

Feature	Topic
Scanning documents only	<i>“Scanning and Importing Documents” on page 9</i>
Scanning documents and importing files from a computer	<i>“Scanning and Importing Documents” on page 9</i>
Copying pages and documents	<i>“Organizing Documents and Pages” on page 12</i>
Moving pages and documents	<i>“Organizing Documents and Pages” on page 12</i>
Deleting pages and documents	<i>“Organizing Documents and Pages” on page 12</i>

Feature	Topic
Enhancing and fixing pages	<i>“Enhancing and Fixing Images” on page 17</i>
Flagging document, page, and field issues	<i>“Flagging Document, Page, and Field Issues” on page 21</i>
Reviewing and fixing extracted data	<i>“Reviewing and Fixing Extracted Data” on page 23</i>

- After you have completed all of the tasks, you can perform a final review and then submit the batch to the Intelligent Capture Server.

## 2.2 Tasks

You can cancel the entire process or move between tasks as follows:

Icon/tooltip/keyboard shortcut	Description and tips
<b>Cancel</b> ALT+Q	Cancels processing all documents in the batch and returns to the capture profile page.
<b>Next</b> ALT+N	Goes to the next task (for example, <b>Review</b> ). You can also click the task.
<b>ALT+P</b>	Goes to the previous task (for example, <b>Organize</b> ). You can also click the task.

### 2.2.1 Scanning and Importing Documents

If you need to replace pages in a document, you must delete the page and rescan or reimport it. Except for changing the size of the thumbnails, the images must have finished processing, which starts after all files or pages have been imported or scanned, before you can proceed to other tasks.



#### Notes



- Automatic document breaking
  - On scanning or import, documents can be automatically broken at a specific page; for example, a patch code or blank page. Automatic document breaking must have been set up by your organization.
- After the initial scan or import, if you want to scan or import more pages and you also want automatic document breaking to be performed (if it has been set up by your organization), then you must do one of the following before starting the scan or import:
  - Highlight the last page in the document set (that is, the last page of the last folder's last document).


- Do not highlight any folders or documents.
- Highlight a folder or document without any pages.

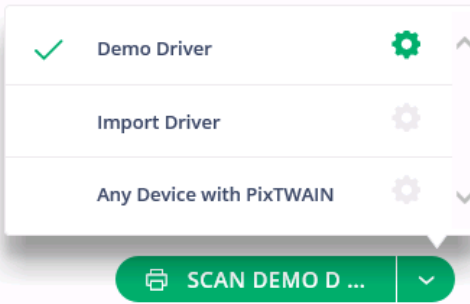

Otherwise, if any page other than the last page in the document set is highlighted, no automatic document breaking is performed; that is, all pages are inserted into the current document after the highlighted page.

If multiple pages have been selected, then automatic document breaking is determined by the first page that was highlighted. For example, if you select the last page in the document set first and then another page, then automatic document breaking is performed.

**Table 2-1: Scan & Import task: actions related to scanning and importing documents**

Icon/tooltip/keyboard shortcut	Action and tips
<p>Drag files into the browser pane or click <b>Browse for Files</b></p> <p><b>CTRL+ALT+F</b></p>	<p>Imports files from a directory. To stop the import, click <b>Stop Import</b>.</p> <ul style="list-style-type: none"> <li>• The maximum file size is 70MB.</li> <li>• In addition to plain text, Microsoft Word, and Microsoft Excel file formats, the following file formats are supported.                             <ul style="list-style-type: none"> <li>- JPEG (* .JPG)</li> <li>- Adobe (* .PDF)</li> <li>- PDF/A (* .PDF)</li> <li>- PDF/Web (* .PDF)</li> <li>- Portable Network Graphics (* .PNG)</li> <li>- TIFF (* .TIF)</li> </ul> </li> </ul> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>- Although the most common color depth and compression formats for these file formats are fully supported, the exact color depth and compression formats are determined by the Cloud Capture Toolkit.</li> <li>- To process PDFs as individual pages, your organization must have enabled it; otherwise, the PDF is simply passed through as a file for batch submission.</li> </ul>
<p><b>Choose Scanner</b></p>	<p>Selects a scanner connected to your computer.</p> <p> <b>Note:</b> You must click the down arrow.</p>

Icon/tooltip/keyboard shortcut	Action and tips
<p><b>Scan</b></p> <p><b>CTRL+ALT+S</b></p>	<p>Scans documents from the selected scanner.</p> <p>To stop the scan, click <b>Stop Scan</b>. After scanning stops, you can still import more files or scan more documents.</p> <ul style="list-style-type: none"> <li>• The recommended minimum scan resolution for good quality OCR is 200 DPI.</li> <li>• The maximum size of an image is 100MB, uncompressed. However, this maximum could be lower depending on the amount of memory that your computer has available at the time of scanning. In most cases, your scanning needs would fall below the maximum image size. Furthermore, the size of an image is determined by the scanned page's dimensions, scan resolution, and color depth. For example, typical—but not absolute—maximums for a page are the following: <ul style="list-style-type: none"> <li>– A4 or US letter</li> <li>– 600 DPI (scan resolution)</li> <li>– 24-bit color</li> </ul> </li> </ul> <p>If a page fails to process because the available memory is exceeded, you would adjust the scan resolution or color depth. For example, you could change the color depth to grayscale.</p> <ul style="list-style-type: none"> <li>• If a scanner does not support a profile setting (such as <b>color, lossless</b> for <b>Color Mode</b>), then a suitable fallback setting is selected for that scanner. In addition, you can select a more appropriate scanner setting.</li> </ul> <p> <b>Note:</b> Only scanners that are directly connected to your computer are available.</p>

Icon/tooltip/keyboard shortcut	Action and tips
 <p>Scanner Settings (the gear icon next the scanner name)</p>	<p>Sets scanner settings.</p> <p> <b>Note:</b> Your organization might have disabled scanner settings.</p> <p>To revert scanner settings to the import profile settings, next to the scanner name, click .</p>
<p>Stop Import / Stop Scan</p> <p>CTRL+Q</p>	<p>Stops in-progress scanning or importing.</p>

## 2.2.2 Organizing Documents and Pages

You cannot undo and redo actions in the **Organize** step, except for editing pages ().









Edit






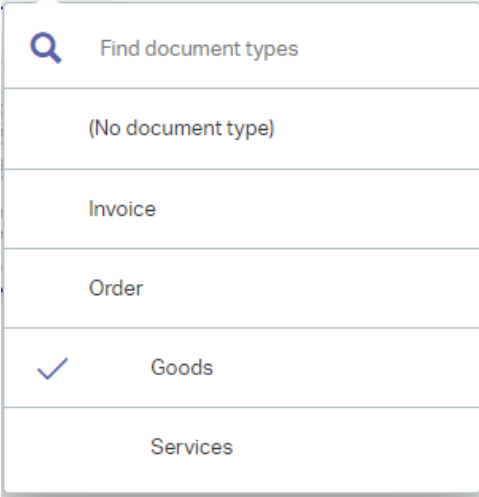
### 2.2.2.1 Documents



Documents contain pages of a specific document type; for example, an auto insurance claim form.

**Table 2-2: Organize task: document actions**

Icon/tooltip/keyboard shortcut	Action and tips
<p>N/A</p>	<p>To select a document, click within the top and bottom margins of the document but outside of a page. The selected document is highlighted by a green border.</p> <p>To select multiple, non-contiguous documents, <b>CTRL</b>+click each document.</p> <p>To select multiple, contiguous documents, <b>SHIFT</b>+click each document.</p> <p>After selecting a document, you could cut, copy, and paste it as well as merge it with other selected documents.</p>

Icon/tooltip/keyboard shortcut	Action and tips
SPACE BAR	Selects or clears the document that was first selected from a set of selected documents. The rest of the set of selected documents remains selected.
ENTER	Maintains the selection of the document that was first selected and clears the rest.   <b>Note:</b> You cannot press ENTER again to select all documents that were originally selected.
CTRL+LEFT ARROW	Selects the next document.
CTRL+RIGHT ARROW	Selects the previous document.
	Moves a document before or after another document.
- / +	Collapses or expands all of the page thumbnails in the selected document.
Collapse All / Expand All A	Collapses or expands all the page thumbnails in all documents to make it easier to reorganize.
 Zoom  Zoom thumbnails ALT+PLUS SIGN ALT+MINUS SIGN	Zooms the view of all page thumbnails in or out.   <b>Note:</b> Although only generic page thumbnails are displayed for Excel and Word files, they are still submitted.
 Cut  Cut selected pages CTRL+X	Cuts the selected documents and places them on the clipboard.
 Copy  Copy selected pages CTRL+C	Makes copies of the selected documents and places them on the clipboard.



Icon/tooltip/keyboard shortcut	Action and tips
 <p>Paste</p> <p>Paste selected pages</p> <p>CTRL+V</p>	<p>Pastes the documents from the clipboard after the selected document.</p>
 <p>Delete</p> <p>Delete selected pages</p> <p>DELETE</p>	<p>Deletes the selected documents.</p>
 <p>Split</p> <p>Split selected pages</p> <p>S</p>	<p>Splits the selected page and any following pages into a new document. However, you cannot split starting with the first page in a document because then the current document would become empty.</p>
 <p>Merge</p> <p>Merge selected pages</p> <p>M</p>	<p>Merges the selected documents.</p>
<p>Click <b>Unclassified</b> or the name of a document type above and to the left of the pages as follows:</p>  <p>D</p>	<p>Selects a document type for the document. If specific templates are available for a document type, they are indented under the document type and are listed by the template name.</p> 






Icon/tooltip/keyboard shortcut	Action and tips
 Find document types	Filters document types by the corresponding string anywhere within the document type name.
 CTRL+ALT+F (Import) CTRL+ALT+S (Scan)	Scans additional documents or imports additional files from your computer.
Stop Import / Stop Scan CTRL+Q	Stops in-progress scanning or importing.




### 2.2.2.2 Pages

Pages are digital images of the scanned or imported pages.

**Table 2-3: Organize pane: page actions**

Icon/tooltip/keyboard shortcut	Action and tips
SPACE BAR	Selects or clears the page that was first selected from a set of selected pages. The rest of the set of selected pages remains selected.
CTRL+LEFT ARROW CTRL+RIGHT ARROW	Moves the focus to the next page on the left or right; the focus also moves to the previous or next document.
ENTER	Maintains the selection of the page that was first selected and clears the rest.  Cannot press ENTER again to select all documents that were originally selected.
None	To move a page, select and drag it.
 Cut selected pages CTRL+X	Cuts the selected pages and places them on the Clipboard.
 Copy selected pages CTRL+C	Makes copies of the selected pages and places them on the clipboard.

Icon/tooltip/keyboard shortcut	Action and tips
 Paste  Paste selected pages  CTRL+V	Pastes the pages from the Clipboard after the selected page.
 Delete  Delete selected pages  DELETE	Deletes the selected pages.
 Rotate  Rotate selected pages  R	Rotates the selected pages counterclockwise.
Position your pointer over a page and click <b>Page Preview</b> .    V	Opens a single page in the <b>Page Preview</b> pane where you can review the page in detail.   <b>Notes</b> <ul style="list-style-type: none"> <li>• Although Excel and Word files are not displayed, they are still submitted.</li> <li>• Viewing PDFs is determined by the browser's support for PDFs. For example, the Adobe plug-in is required for Internet Explorer.</li> </ul>
Click X.  ESC	Closes the <b>Page Preview</b> pane.



Icon/tooltip/keyboard shortcut	Action and tips
 <b>Edit</b>  <b>Edit selected pages</b>  Position your pointer over a page and click  <b>Edit</b>   <b>CTRL+ALT+E</b>	Opens pages in the <b>Edit Pages</b> pane where you can enhance and fix them.  For more information, see <a href="#">“Enhancing and Fixing Images”</a> on page 17.   <b>Notes</b> <ul style="list-style-type: none"> <li>• Although Excel and Word files are not displayed, they are still submitted.</li> <li>• Viewing PDFs is determined by the browser's support for PDFs. For example, the Adobe plug-in is required for Internet Explorer.</li> </ul>







### 2.2.3 Enhancing and Fixing Images

Viewing PDFs is determined by the browser's support for PDFs. For example, the Adobe plug-in is required for Internet Explorer.

Although text, Excel, and Word files are not displayed, they are still submitted.








**Table 2-4: Page Preview pane: actions**







Icon/tooltip/keyboard shortcut	Action and tips
<b>CTRL+SHIFT+LEFT ARROW</b>  <b>CTRL+SHIFT+RIGHT ARROW</b>  <b>SHIFT+</b> rotate the wheel button	Pans the image.  You could also use the scroll bars or drag the image using the wheel button.
<b>CTRL+SHIFT+UP ARROW</b>  <b>CTRL+SHIFT+DOWN ARROW</b>  Rotate the wheel button	
 <b>Page</b>  <b>Fit Page</b>  <b>CTRL+ALT+P</b>	Fits the page height and width to the viewing pane.
 <b>Width</b>  <b>Fit Width</b>  <b>CTRL+ALT+W</b>	Fit the page width to the viewing pane.



Icon/tooltip/keyboard shortcut	Action and tips
 Zoom  Zoom value  ALT+PLUS SIGN  ALT+MINUS SIGN  CTRL+ rotate the wheel button	Zooms the view in or out.
  RIGHT ARROW	Displays the next page in the <b>Page Preview</b> pane.
  LEFT ARROW	Displays the previous page in the <b>Page Preview</b> pane.
 Edit  Edit page  CTRL+ALT+E	Opens pages in the <b>Edit Pages</b> pane where you can enhance and fix them.  For more information, see <a href="#">“Enhancing and Fixing Images” on page 17</a> .   <b>Notes</b> <ul style="list-style-type: none"> <li>• Although Excel and Word files are not displayed, they are still submitted.</li> <li>• Viewing PDFs is determined by the browser's support for PDFs. For example, the Adobe plug-in is required for Internet Explorer.</li> </ul>
 Delete  Delete  DELETE	Deletes the page in the <b>Page Preview</b> pane.

**Table 2-5: Editing Pages pane: actions**

Icon/tooltip/keyboard shortcut	Action and tips
Page editing	

Icon/tooltip/keyboard shortcut	Action and tips
 <b>Black and White</b> <b>B</b>	Converts the image to black and white.
 <b>Brightness</b> <b>T</b>	Adjusts the brightness of the image.
 <b>Contrast</b> <b>C</b>	Adjusts the contrast of the image.
 <b>Crop</b> <b>SHIFT+C</b>	Crops the image. You can specify the height and width of the crop area as follows: <ul style="list-style-type: none"> <li>• Enter the number of pixels for the width (in the first field) and the height (in the second field).</li> <li>• Manually select the crop borders to resize the crop area.</li> </ul> You can drag the crop area to select a different part of the image.  Select <b>Auto-crop</b> to allow the trimming of white space from around the edge of the image.
 <b>Deskew</b> <b>D</b>	Straightens images that have been tilted while scanning.
 <b>Despeckle</b> <b>SHIFT+D</b>	Removes noise found on the original image. Before removing noise, the image is converted to black-and-white.
 <b>Grayscale</b> <b>G</b>	Convert the image to 8-bit grayscale.

Icon/tooltip/keyboard shortcut	Action and tips
 <b>Line Removal</b> L	Deletes the following types of lines from an image: <ul style="list-style-type: none"> <li>• Solid lines, such as ones that make up boxes or tables</li> <li>• Dashed or dotted lines</li> </ul> Before removing lines, the image is converted to black-and-white.
 <b>Overscan Removal</b> O	Removes the image's surrounding black area, which was generated by a scanner's overscan option.
 <b>Rotate Clockwise/Rotate Counterclockwise</b> SHIFT+R (Rotate clockwise) R (Rotate counterclockwise)	Rotate the image clockwise or counterclockwise by 90 degrees.
 <b>Undo/Redo</b> CTRL+Z (Undo) CTRL+Y (Redo)	Undo or redo changes. You can undo at least the last five changes.   <b>Note:</b> If you select another image, you cannot undo changes to the previously selected image.
Zooming and panning	
CTRL+SHIFT+LEFT ARROW CTRL+SHIFT+RIGHT ARROW SHIFT+ rotate the wheel button	Pans the image.  You could also use the scroll bars or drag the image using the wheel button.
CTRL+SHIFT+UP ARROW CTRL+SHIFT+DOWN ARROW Rotate the wheel button	
 Page <b>Fit Page</b> CTRL+ALT+P	Fits the page height and width to the viewing pane.

Icon/tooltip/keyboard shortcut	Action and tips
 Width  <b>Fit Width</b>  <b>CTRL+ALT+W</b>	Fit the page width to the viewing pane.
 Zoom  <b>Zoom value</b>  <b>ALT+PLUS SIGN</b>  <b>ALT+MINUS SIGN</b>  <b>CTRL+</b> rotate the wheel button	Zooms the view in or out.
Saving and closing	
<b>Save Changes</b>  <b>S</b>	Save changes and exit from the <b>Editing Pages</b> pane.
Click <b>X</b> .  <b>CTRL+Q</b>	Closes the <b>Edit Pages</b> pane without saving changes.

## 2.2.4 Flagging Document, Page, and Field Issues

During batch processing only, you can flag document, page, and field issues to review and fix in the future.




To select flags to apply to multiple documents or pages, or a field, click **Flag** or **CTRL+G**, and select the appropriate reasons.

If only one flag is available, then the flag dialog box is not displayed and one of the following occurs:


- If the flag does not exist on any of the selected pages or exists on only a subset of them, then the flag is applied to the rest of the selected pages.
- If the flag exists on all selected pages, then the flag is removed from all of them.

In the flag dialog box, you can perform the following actions:

Button/Keyboard Shortcut	Action and tips
N/A	<p>If a flag's check box is filled with a square , then that flag exists on only a subset of the selected pages. To remove the flag from that subset of pages, click the check box; you could then reapply the flag to all of the selected pages by selecting the flag again.</p>  <p><b>Tips</b></p> <ul style="list-style-type: none"> <li>• Keyboard shortcuts are displayed next to the flagging reasons.</li> <li>• Positioning the pointer over the flag icon displays the flagging reasons that have been applied.</li> <li>• Flagging reasons are displayed for the fields.</li> </ul>
<b>Cancel / ESC</b>	Cancel all changes and close the dialog box
<b>Clear All / DELETE</b>	Deselect all currently selected flags
<b>Apply / ENTER</b>	Apply selected flags, remove unselected flags, and close the dialog box

Flags are displayed as an orange flag (  ) on a page, an orange flag above a document thumbnail, or with an orange outline around a field.

Your organization is responsible for setting up flags for you to use.

 **Notes**

- If your organization has prevented you from submitting a batch with validation errors, you can still flag all field-level errors to submit the batch.
- If your organization has prevented you from submitting a batch with unclassified documents, you can still flag those unclassified documents to submit the batch.

## 2.2.5 Reviewing and Fixing Extracted Data

You review and fix the data extracted from documents against a document type. A document type represents a standard kind of document in your organization and defines the page data to be extracted and validated for that kind of document; for example, an invoice, an insurance claim form, a purchase order, or a questionnaire. For example, you could validate insurance claim numbers, reimbursement amounts, barcodes, and dates. If a list of document types is not available or you have questions about which document type to choose or about the data to validate, see the person in your organization who created the document type.

In batch processing mode, you can also flag fields that need to be processed at a later time. For more information, see [“Flagging Document, Page, and Field Issues” on page 21](#).

If your administrator has configured the machine-learning feature, then a document that has not been classified as belonging to a specific document type before might have only a few or no fields automatically extracted. As you review and manually enter data for more documents of this document type, more data is extracted.


While reviewing data, you can perform basic actions, table actions, and populate fields with data directly from the image as described in the following sections.






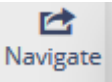



### Notes

- If your organization allowed it, you can still submit a batch that has validation errors or that has unclassified documents.
- Other validation features (enabled through buttons) might have been made available by your organization.
- Some values might apply to all documents in the batch whereas others apply to a document only.








### Selecting options to make your work more efficient



Icon/tooltip/keyboard shortcut	Action and tips
	<p>Shows or hides the thumbnail view of the pages.</p> <p>To see more of the image or form view, you could hide the thumbnail view.</p> <p>To quickly select a page from a long document or many different documents, you could show the thumbnail view.</p>

Icon/tooltip/keyboard shortcut	Action and tips
	<p>Displays the form view in a separate window.</p> <p>For a larger view of the data, you could display the form view in a separate window (which could be on another monitor). Later, you could pop it back into the main window.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• Only available when the form view is at the bottom of the main browser window.</li> <li>• Closing the window also returns it to the main browser window.</li> </ul>
 <p>Layout</p> <p><b>Change layout</b></p>	<p>Switches the relative positions of the page, form, and thumbnail panes.</p> <p>While reviewing data, you might want to change the layout of the panes. For example, to see more of the image, you could place the data validation and entry pane at the bottom of the window. The panes are the following:</p> <ul style="list-style-type: none"> <li>• Page or image preview</li> <li>• Data validation and entry (also known as the form view)</li> <li>• A thumbnail view of the pages</li> </ul>

Icon/tooltip/keyboard shortcut	Action and tips
 <p><b>Select Single Click Entry Navigate</b></p> <ul style="list-style-type: none"> <li>• <b>Next Issue</b> CTRL+ALT+1</li> <li>• <b>Next Field</b> CTRL+ALT+2</li> <li>• <b>On-Image Navigation</b> CTRL+ALT+3</li> </ul>	<p>Changes where the focus is sent after a field is validated for single-click entry.</p> <p>Set your preferred way of navigating the form and image as you review and fix data.</p> <ul style="list-style-type: none"> <li>• <b>Next Issue</b> On validation, go to the next issue on the form.</li> <li>• <b>Next Field</b> On validation, go the next field on the form.</li> <li>• <b>On-Image Navigation</b> While the pointer is positioned on the image, the following actions are enabled: <ul style="list-style-type: none"> <li>– Move the focus to the next field or table cell by using <b>ALT</b> + mouse wheel. The corresponding zone on the image is also highlighted.</li> <li>– Move the focus to a cell in the form view by positioning the pointer over a cell in a table (on the image).</li> </ul> </li> </ul> <p> <b>Note:</b> To perform either of the aforementioned table actions, the table must be open in the form view.</p>
 <p><b>Enable or disable the Data Type Locator</b></p>	<p>Changes whether or not all valid data on the image is highlighted for the active field.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• A dark background indicates that <b>Suggest</b> is enabled.</li> <li>• Some fields might have placeholders that are automatically inserted when the field is validated. For example, a phone number could have parentheses and hyphens as placeholders.</li> <li>• Your administrator must enable this feature as well as specify the data that is valid for each field.</li> </ul>




### 2.2.5.1 Basic actions

Icon/tooltip/keyboard shortcut	Action and tips
Field actions	
 <b>ENTER</b> (for a single-line field only)	Confirms that the field data is valid.  For a multiline field, you could also press <b>TAB</b> to change the focus from the field data to <b>Confirm</b>  and then press <b>SPACEBAR</b> .
 <b>Calculate</b>	Automatically calculates the value of a field based on the values in other fields.
 <b>Populate based on dependent fields</b>	Populates a field's available choices based on the value in another field (that is, a dependent field).
 <b>Populate with external data</b>	Based on the value in the selected field, populates multiple fields with data from an external data source.
Zooming and panning	
<b>CTRL+SHIFT+LEFT ARROW</b> <b>CTRL+SHIFT+RIGHT ARROW</b> <b>SHIFT+</b> rotate the wheel button	Pans the image.  You could also use the scroll bars or drag the image using the wheel button.
<b>CTRL+SHIFT+UP ARROW</b> <b>CTRL+SHIFT+DOWN ARROW</b> Rotate the wheel button	
 <b>Fit Page</b> <b>CTRL+ALT+P</b>	Fits the page height and width to the viewing pane.
 <b>Fit Width</b> <b>CTRL+ALT+W</b>	Fit the page width to the viewing pane.

Icon/tooltip/keyboard shortcut	Action and tips
 Zoom  <b>Zoom value</b> <b>ALT+PLUS SIGN</b> <b>ALT+MINUS SIGN</b> <b>CTRL+</b> rotate the wheel button	Zooms the view in or out.
Document navigation	
<b>ALT+R</b> (Document to the right)	Displays the first page in the next document.
<b>ALT+L</b> (Document to the left)	You could also click the document or page in the thumbnail view.
<b>Next Doc</b>	Goes to the next document in the batch.   <b>Note:</b> If all of the issues have been fixed, then <b>Next Doc</b> is displayed.
Field navigation	
<b>CTRL+DOWN ARROW</b>	Goes to the next field regardless of whether it needs to be validated or not.
<b>CTRL+UP ARROW</b>	Goes to the previous field regardless of whether it needs to be validated or not.
<b>CTRL+HOME</b>	Goes to the first field in the document.
<b>CTRL+END</b>	Goes to the last field in the document.
<b>Next Issue</b>	Goes to the next field that needs to be validated.
<b>Previous</b>	Goes to the previous field that needs to be validated.

### 2.2.5.2 Table actions

Icon/tooltip/keyboard shortcut	Action and tips
N/A	When the data validation and entry pane is on the right side of the window, edit a table by clicking it in the pane. The table is displayed in a separate pane for editing individual rows.  When the data validation and entry pane is at the bottom of the window, you can edit it directly in the pane.

Icon/tooltip/keyboard shortcut	Action and tips
<p><b>Autocomplete</b></p> <p>On the image, right-click <b>Autocomplete Table</b>.</p> <p><b>ALT+A</b></p>	<p>Requests for Web Client to complete all rows in the table.</p>
<p><b>Close</b></p> <p><b>CTRL+Q</b></p>	<p>Closes the table pane.</p> <p>You could also click a field in the form pane.</p>
<p><b>Delete Row &gt; Delete All</b></p> <p><b>SHIFT+CTRL+DELETE</b></p>	<p>Deletes the entire table.</p> <div style="background-color: #f0f0f0; padding: 5px;">  <p><b>Caution</b> You cannot undo this action.</p> </div>
<p><b>Delete Row &gt; Delete Row</b></p> <p>On the image, right-click <b>Delete Row</b>.</p> <p><b>ALT+DELETE</b></p>	<p>Deletes a row.</p> <div style="background-color: #f0f0f0; padding: 5px;">  <p><b>Caution</b> You cannot undo this action.</p> </div>
<p><b>Insert Row &gt; Insert Above</b></p> <p>On the image, right-click <b>Insert Row Below</b>.</p> <p><b>ALT+INSERT</b></p>	<p>Adds a row.</p>
<p><b>Insert Row &gt; Insert Below</b></p> <p>On the image, right-click <b>Insert Row Above</b>.</p> <p><b>INSERT</b></p>	
	<p>Moves to the next or previous page of rows.</p>

**2.2.5.2.1 Automatically completing tables**

With one or more rows already filled out in the table pane, to automatically fill out the rest of the rows, click a row and then **Autocomplete**. All of the rows below the active row are filled in with the data from the table on the image. Any existing row data is modified. Depending on the complexity of the table, you might need to manually enter the data for more than one row; for example, tables with the following formatting:

- Rows contain a different number of columns
- The table breaks across pages

You could repeat **Autocomplete** for any remaining empty rows until all rows have been filled.

 **Notes**

- For table autocomplete to be enabled, the ability to directly populate fields with data from the image must be enabled for the capture profile.
- It is recommended that table autocomplete be used with **Navigate > On-Image Navigation** or **Navigate > Next Field** so that the focus remains in the table and you can continue filling in the rows, if necessary. Otherwise, if **Navigate > Next Issue** is enabled, then, after table autocomplete is executed, the focus could be sent to a field with an issue that is outside of the table.

### 2.2.5.3 Directly populating fields with data from the image

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:

 **Notes**

- The person in your organization who created the capture profile must have enabled the aforementioned actions, except for editing the data in the tooltip.
- When the current field is empty, all numeric and date data that is valid for the field is highlighted.
- A tooltip for the data is displayed when the pointer is positioned over the data on the image. The tooltip includes the field name, data to be copied, and validation error (if applicable).
- Click the data.
- Drag over the data.
- To multiselect or deselect entire words, perform one of the following actions:
  - **SHIFT+** click each word.
  - **SHIFT+** drag over the words.
- To select individual characters, use one of the following:
  - **CTRL+** click each character.
  - **CTRL+** drag over the characters.
- For a single-line field, you can edit the data to be copied before populating the field with it by pressing **F2**, editing the data in the tooltip, and then pressing **ENTER**.


 **Note:** To cancel editing, press **ESC**.

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



# Appendix A. Menu Quick Reference

**Table A-1: Menu Items**

Menu Item	Description
<your_avatar_user_name> > <b>Help</b>	Displays this <i>Intelligent Capture Web Client Guide</i> .
<your_avatar_user_name> > <b>Licensing</b>	Displays the <b>Intelligent Capture Licensing</b> page.  <b>Note:</b> This menu item is only available if you have Intelligent Capture Administrator privileges.
<your_avatar_user_name> > <b>Sign Out</b>	Logs you out.

