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OpenText™ Intelligent Capture

# Desktop Client Guide: Identification and Completion

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

ECPCORE220300-CCV-EN-01

**OpenText™ Intelligent Capture**
**Desktop Client Guide: Identification and Completion**
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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.

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

**Note:** The Completion, Identification, and Extraction modules support document type scripts. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*.

## 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.

The Identification module is an attended module, meaning that an operator must manually interact with the module to successfully process data through to the next step. Batches selected for processing during production open automatically in the Identification production window where the operator can complete and correct automatic classification that was performed during the Classification step.

The Identification module requires the following configuration and components to operate successfully:

**Includes the module as a step within a process**
The Identification module interfaces with Intelligent Capture Servers through a process file. To use the module, include it as a step within a process. The process must be compiled into an IAP file and be used in a production environment.

**Uses settings defined in setup mode**
Before you run the module within a process in production, you must configure it. To do this, run the module for setup and define specific configuration settings for module within the process. You can set up the module at the process level or batch level.

**Has two project types**
The Identification module uses one of the following types of projects:

- **Recognition project** (`DPP`): The `DPP` file is created using the Recognition Designer application and contains the templates, base images, and rules for processing documents. You can use a single `DPP` file for all document capture jobs or create different project files based on specific processing needs. Specify the `DPP` file to use during module setup; therefore, each task the module receives can potentially use a different `DPP` file. During production, the module loads the `DPP` file into memory and keeps it there until it receives a task that specifies a different project file or until the module exits. The `DPP` files must be stored in a location that is accessible to all machines that run the module.
- **Information extraction project**: Contains profiles that define classification and extraction. Information extraction projects use document types as work items. Pages are classified by assigning a document type and can be flagged. Neither templates nor index fields are used.

**Processes tasks in production mode**
To process tasks using the module, run the Identification module for production. Once the module is started for production, you can choose the mode in which to process tasks.

**Includes special error handling instructions to handle runtime errors**
When the module completes a task successfully during production, it sets the <*TaskResult*> IA value to 0. If the module determines an error has occurred while processing a task, the module sets <*ExportResult*> to a non-zero value and logs the error message to the Intelligent Capture Server Event log. When an error occurs, even when one or more of the pages in the task could have produced the error, the module finishes the task with a Success status provided it can process the rest of the pages in the task and the **Skip node that produced the error and continue with remaining nodes** option is selected during module setup. The

Success status causes the module to run the `Finish` event so that the step can call its `Finish` event handler. The module fires the `Error` event only if the task finishes with a Failure status. A Failure status can result when the task is aborted, either because of user response to an error prompt or when the Abort entire task option is selected during module setup. In this situation, the module should call an `Error` event handler. The `Error` event handler in the process should check the exception in the <*ErrorText*> IA value to determine the cause of the error, and then take the appropriate action.

### 1.2.1 Operator Procedure

The Identification operator procedure includes the following steps:

1. The operator selects work and starts receiving tasks.
2. The operator receives the task. The task is displayed in the main window.

   A task can include a single page or multiple pages arranged into documents and higher-level folders.
3. The operator works on the task. When processing a task, the operator can expand and view the task structure in a special panel of the main window. Documents and pages that require attention are marked with icons and color shading, helping the operator select work items and view the progress.

   **Note:** Page mode allows operators to use Identification for rapid image quality assurance. The module enters the one-page mode when triggered on the page level (level 0). For information extraction projects, operators can only flag the page.

   - For **recognition** projects, the operator performs the following actions:
     a. Identifies the type of each document if not identified automatically.
     b. Verifies that all document pages are assigned a document type and assigns a document type manually where necessary.
     c. Verifies that all document pages are assigned a page template, and assigns a template manually where necessary.
     d. Verifies that all index fields specific for a particular page include values exactly as they are shown on the image of the page. If necessary, the operator edits index fields.
     e. Flags documents and pages to indicate their special status as defined by the business process.
     f. Annotates pages to hide sensitive information, to highlight particular data on the image, or to add a note.
   - For **information extraction** projects, the operator performs the following actions:
     a. Identifies the type of each document if not identified automatically.

   b. Flags documents and pages to indicate their special status as defined by the business process.

   c. Annotates pages to hide sensitive information, to highlight particular data on the image, or to add a note.

4. When the task is completed, the operator sends it back to the server. The operator can also return an incomplete task to the server queue to defer and finish this task later.

5. If work (a batch or all batches) is not finished, the operator receives the next task from the server.

   It the task is not ready, Identification enters the waiting mode. When the next task is received, Identification exits the waiting mode automatically.

6. When work has finished, Identification enters the waiting mode. The operator can exit the waiting mode and get more work.

## 1.3 Completion

Completion is Intelligent Capture's unified, high-performance operator client that provides a full-featured interface for indexing images and validating index data. The main benefits include:

- Document types that can span multiple pages and can automatically navigate to the correct page for an index field. This feature eliminates the need for operators to search page-by-page for an index field.

  A document type is the data entry form that Completion operators use for validation. It consists of fields and controls, a layout, a set of validation rules, and document and field properties. A document type can cover multiple pages or no pages.

  The designer creates document types using Intelligent Capture Designer.

- Data entry featuring configurable layout, styles, rich controls, user-defined shortcuts, form segmentation, field summary, drop-down image snippets, annotations, auto-navigation to configured work, and close integration with Intelligent Capture recognition technology.
- A configurable document, page, and field-flagging mechanism.
- Multiple table support including table *OCR* smart-extraction.
- High-performance indexing and keyboard-only operation.
- Field finder enables searching of text within the field labels and content.
- Work mode allows Intelligent Capture administrators to mix-and-match functionality and design the operator job.
- Page mode allows operators to use Completion for rapid image quality assurance. The module enters the one-page mode when triggered on the page level (level 0).
- Visualization of *PDF* documents.

- Page filtering mode restricts operator activities to pages that require attention.
- Validation rules that support expression-, script-, or data query-based automatic checking of multiple fields, including data in table rows.

**Note:** Whereas Identification processes pages, Completion is not dependent on pages and instead processes data fields extracted from pages. Those data fields are organized into a collection of index values that are further grouped together into a document object. Therefore, even if a Completion task does not contain pages, an operator can still create empty document nodes, assign document types to them, and then enter index values for fields defined for the selected document types. All defined population and validation rules are also executed. The operator can even set flags on fields and documents. All the index values, manually entered by the operator, are saved in the batch and processed by subsequent CaptureFlow steps.

Chapter 2

# Setting Up the Modules

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

## 2.1 Setup Options for All Modules

For options that apply to the view and behavior of all modules, including Completion and Identification, you use Intelligent Capture Administrator and Intelligent Capture Designer.

**Notes**

- For visual styles (such as font, background/foreground color as well as batch level names and the thumbnail default size to be displayed in the **Documents** panel) and keyboard shortcuts, select the **Configuration** tab in Intelligent Capture Designer.
- To set the timeout value for Completion and Identification, use Intelligent Capture Administrator.

## 2.2 Configuring direct population of fields with data from the image (Identification and Completion)

**Note:** For Identification, indexing is not available for information extraction (IE) 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, you must enable Click to Extract by using the OCR data cache, whereas basic rubberbanding is available by default; although, basic rubberbanding can also optionally use the OCR data cache.

When CaptureFlow uses an information extraction project, the `OcrDataCache` parameter value can also be populated from a previous Classification or Extraction step. Note that this will still not work for advanced recognition-based projects, but if you are using only information extraction, this simplifies the workflow because you can skip the Standard OCR step if you were using it only to generate OCR data.

## Enabling Click to Extract

To enable the Click to Extract feature, assign the `OcrDataCache` IA value to **Completion** or **Identification**from the **Standard OCR** step as follows:

```
Assign to <Completion> | <Identification>:0.OCRDataCache the value StandardOCR:
0.OCRDataCache
```

**Note:** By default, click to Extract overrides the use of **CTRL**+left-click/right-click to zoom in/out on the image. To use these key combinations for zooming in/out on the image, in Intelligent Capture Designer, set **System** > **System Configuration** tab > **Other Options** > **Global Options** > **Intelligent Capture Desktop** > **CtrlClickBehavior** to **Image Zoom**.

## Enabling the OCR data cache for basic rubberbanding (optional)

To improve the performance of basic rubberbanding, you can use the associated OCR data cache to fill in the rubberbanded fields. That is, when the **Standard OCR** step precedes Completion or Identification, the OCR data cache produced by the Standard OCR module can be used to fill in the rubberbanded fields instead of running the full page OCR reading for each field.

To use OCR data cache in the desktop client modules, ensure the following is performed:

- The `OcrDataCache` IA value is passed to **Completion** or **Identification**from the **Standard OCR** step.

  To do this, in the CaptureFlow assign to *<Completion>/<Identification>:0.OCRDataCache* the value *StandardOCR:0.OCRDataCache*.

- Rotation was not applied to the image. The `Rotation` IA value is equal to 0.

- In Recognition Designer >**Project Options** > **Standard OCR** tab:

  – The **Enable OCR data cache from Standard OCR** option is enabled.

  – The list of engines for recognizing specific data prior to data from Standard OCR does not include the OCR engine for zone/free-form extraction.

**Note:** OCR data cache is relevant to the page processed on the **StandardOCR** step. If annotations were applied to the page during the next steps to hide sensitive data, it might become visible in case when OCR data cache is used for rubberbanding.

## 2.3 Setting Up Identification

These topics describe how to set up the Identification module.

### 2.3.1 Configuring Operator View and Workflow for Efficiency

**Table 2-1: Identification Setup: View and Navigation Settings**

| Element | Description |
|---|---|
| **Display backsides of pages** | Displays the backsides of pages in the **Documents** panel; otherwise, they are not displayed.<br><br>A page is considered a backside if its *`Backside`* input IA value is assigned a value of 1. |
| **Auto-advance to next page** | When all work on the current page has been completed, the operator is automatically advanced to the next page that needs work. If the current page is the last page in the task, then the behavior is defined by the **Auto-advance to next task** setting.<br><br>**Note:** This option applies if Identification is triggered at the Document level (level 1) or higher. |
| **Auto-advance to next document** | When all work in the current document has been completed, the operator is automatically advanced to the next document that needs work.<br><br>**Note:** This option applies if Identification is triggered at the Document level (level 1) or higher. |
| **Auto-advance to next task** | When all work in the current task has been completed, the operator is not prompted and automatically advanced to the next task; otherwise, the operator is prompted to advance to the next task.<br><br>**Note:** If the current task still has work to be done, then the focus stays in the current field. |

| Element | Description |
| --- | --- |
| **Prompt to confirm change of document classification** | The operator is prompted to confirm changing a document type or a template code; otherwise, the operator is not prompted.<br><br>**Note:** This setting works with automatic template assignment. |
| **Display image snippets** | Small image snippets are displayed near the data entry fields in the **Index Fields** panel; otherwise, no image snippets are displayed.<br><br>**Note:** Indexing is not available for information extraction projects. |

## 2.3.2 Enabling the Operator to Perform Certain Tasks

**Table 2-2: Identification Setup: Permissions**

| Element | Description |
|---|---|
| **Allowed template codes** | Specifies the primary filter for populating the pick lists on the document nodes in the **Documents** panel. Depending on the **Select templates based on** setting, the pick list is populated with template codes in either this filter or document type templates.<br><br>Specify the filter as follows:<br>• Leave the default value (*) to use all template codes available in the recognition project and then filter this list using the **Allowed document types** filter (below).<br>• Specify the list of allowed template codes. Add one template code per line, pressing **ENTER** to start a new line.<br>Use the wildcard (*) to specify a group of template codes. For example, `Invoice*` stands for all codes that start with “Invoice”.<br>• Clear the list to disable the document classification. The operator will not be able to expand the pick list and assign a document type or a template code to a document.<br><br>**Notes**<br>• Alternatively, the list of allowed template codes can be passed to the step's *`AllowedDocTypes`* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.<br>• The filter specified in this setup setting or passed in the *`AllowedDocTypes`* IA value can be further refined by the `BeforeShowDocumentList()` API method (document type scripting). For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*.<br>• Templates are not used in information extraction projects. |
| **Allow task to finish with incomplete work** | Select this option to allow the operator to finish the task with unclassified pages. |

| Element | Description |
| --- | --- |
| **Show only generic templates** | Select this option to display only generic templates in the **Template List** panel.<br><br>If not selected, the **Template List** panel displays all kinds of templates.<br><br>**Note:** Templates are not used in information extraction projects. |
| **Assign last used template to multiple pages** | Select this option to allow the operator to select multiple pages in the **Documents** panel and assign the last used template to all of them.<br><br>**Notes**<br>• This option applies if Identification is triggered at the Document level (level 1) or higher.<br>• Templates are not used in information extraction projects. |
| **Abandon changes** | Select this option to allow the operator to close the task without saving changes as long as there are no task tree structure or image changes.<br><br>If not selected, the canceled task returns to the server with all changes saved; no prompt is displayed. |
| **Edit images** | Select this option to allow the operator to rotate images. |
| **Annotate images** | Select this option to allow the operator to annotate images. If images have been annotated prior to the Identification step, the operator can view these annotations on images in the page view.<br><br>If not selected, the **Annotations** palette is unavailable. The operator cannot apply, edit, or remove annotations, or view existing annotations in the page view.<br><br>**Note:** This setting does not affect the way how pages are displayed in the **Documents** panel. The page thumbnails are always displayed with annotations if such are available. |

| Element | Description |
|---|---|
| **Copy pages** | Select this option to allow the operator to copy and paste pages in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered at the Document level (level 1) or higher. |
| **Copy documents** | Select this option to allow the operator to copy and paste documents in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered on or above the Document level (level 1). |
| **Move pages** | Select this option to allow the operator to cut and paste pages within the current document and between documents in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered at the Document level (level 1) or higher. |
| **Move documents** | Select this option to allow the operator to cut and paste documents within the current folder and between folders in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered on or above the Document level (level 1). |
| **Delete pages** | Select this option to allow the operator to delete unnecessary pages from documents in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered at the Document level (level 1) or higher. |
| **Delete documents** | Select this option to allow the operator to delete unnecessary documents (with all pages) in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered on or above the Document level (level 1). |

| Element | Description |
|---|---|
| **Delete folders** | Select this option to allow the operator to delete unnecessary folders (with all documents) in the **Documents** panel.<br><br>**Note:** This option applies if Identification is triggered on or above the Folder level (level 2). |
| **Print pages** | Select this option to allow the operator to print pages and documents.<br><br>When cleared, printing is disabled. |
| **Print overlay** | Select this option to add a task name and document rank to a single print page.<br><br>When cleared, this additional information is not added to a single print page. |
| **Flag pages and documents** | Select this option to allow the operator to flag pages and documents.<br><br>If not selected:<br>• The operator cannot set or remove flags.<br>• The main window hides all **Flag** buttons and related menu options.<br>• If the task has pages and/or documents flagged on the previous CaptureFlow steps, the operator sees such flags in the **Documents** panel and that bottom of the **Page View** panel. However, the operator cannot operate these imported flags. |

| Element | Description |
|---|---|
| **Allowed document types** | Click the **<*n*> options** link to specify the secondary filter for populating the pick lists on the document nodes in the **Documents** panel. Depending on the **Select templates based on** setting, the pick list will be populated with the allowed document types or with the codes of the templates defined in the allowed document types.<br><br>This filter is used if the **Allowed template codes** filter is set to "*" ("use all template codes"). In this case, the primary filter selects from the recognition project all template codes, or document types associated with all template codes available. Next, the selection is filtered using the **Allowed document types** filter.<br><br>Depending on the desired outcome, specify the allowed document types as follows:<br>• Leave the default value (*) to fetch all document types or template codes from the recognition project.<br>• Specify the list of allowed document types. Add one document type per line, pressing **ENTER** to start a new line.<br>Use the wildcard (*) to add a group of document types. For example, `Invoice*` will result in all document types that start with "Invoice".<br>• Clear the list to leave the pick list empty. The operator will not be able to classify documents.<br><br>**Notes**<br>• Alternatively, the list of allowed document types can be passed to the step's *`AllowedDocTypes`* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.<br>• The filter specified in this setup setting or passed in the *`AllowedDocTypes`* IA value can be further refined by the `BeforeShowDocumentList()` API method (document type scripting). for more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*. |

| Element | Description |
|---|---|
| **Organize documents** | Select this option to allow the operator to create empty documents and split and merge documents in the **Documents** panel.<br><br>If not selected, these operations are not allowed.<br><br>**Note:** If the recognition project (DPP) linked to the task defines the binding field, this setup option is ignored during runtime. The operator does not have access to commands **New document**, **New empty document**, and **Merge document**. The respective menu options and toolbar buttons are not displayed (hidden). |
| **Show batch structure up to level** | Select this option to allow the operator to hide nodes above the specified level from the **Documents** panel. Options: levels 2 to 6. |
| **Organize folders up to level** | Select this option to allow the operator to merge, split, and create nodes in the **Documents** panel on and above the selected level. Values:<br>• Levels 2 to 6<br>• None: Disables merging, splitting, and creating nodes above the Document level (level 1). |

## 2.3.3 Configuring Template Assignment

**Note:** Templates are not used in information extraction projects.

### Automatic Template Assignment

When the automatic template assignment mode is enabled, the operator classifies a document manually, after which all document pages are classified automatically. Technically, the operator expands the pick list on the document the **Documents** panel and selects the list item – a *document type* or a *template code*. The Identification engine fetches from the recognition project all templates associated with the selected list item. The fetched items are sorted either by *template ID* (matches the template order in the recognition project) or by *template name*. This sorting take places in the array of selected templates and does not affect the template order in the recognition project or in the **Template List** panel. The sorted array of templates is assigned to all document pages in the “one to one” manner. If the number of pages in a document exceeds the number of templates in the array, the last template is assigned to all remaining pages.
To configure automatic template assignment, do the following:

- Specify whether the pick list will display document types or template codes.
- Specify the parameter by which the array of selected templates will be sorted.
- Choose to show or hide a warning when the operator selects a list item without associated templates.
- Enable the automatic template assignment mode to force it on the operator's machine when they receive a new task for processing. The operator can enable and disable automatic assignment in the scope of a task.

### Manual Template Assignment

For manual template assignment, configure the behavior and displayed content of the **Template List** panel, namely:

- Template assignment based on template codes: Enable this feature to hide the **Template Name** column from the **Template List** panel and display template codes only.
- **Template List** panel sorting: Enable this feature to display five most recently used templates on top of the **Template List** panel.
- **Template List** panel filtering: Enable this feature to filter the **Template List** panel to show templates that belong to the document type or code assigned to the document currently selected in the **Documents** panel.

The **Template List** panel configuration applies by default when the operator receives a task. The operator can enable or disable these settings in the main window in the scope of a particular task.

**Note:** Before displayed in the **Template List** panel, templates can be resorted or additionally filtered using document type scripting. The `BeforeShowTemplates()` method is called every time a different page becomes active in the **Page View** panel, that is, when the operator selects a different item (a page, a document, or higher) in the **Documents** panel. The `BeforeShowTemplates()` method receives the templates already sorted and filtered as specified during setup or by the operator. This method populates the **Template List** panel with the modified content. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*.

## Identification Setup: Project and Template Assignment

### Table 2-3: Identification Setup: Settings

| Element | Description |
|---|---|
| **Recognition project** | Select one of the following:<br>• Information extraction project<br>• Recognition project (DPP file)<br>The selected project with all of its page templates is linked to the Identification step that you currently set up.<br>Alternatively, the recognition project can be assigned to the step's *`DispatcherProjectName`* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.<br>**Note:** If the required project is not in the list, make sure the following is true:<br>• The recognition project is copied to a shared folder that can be accessed by the Intelligent Capture Server.<br>• The *UNC* path of the shared folder is specified in the **RecognitionProjectSharedDirectory** parameter in Intelligent Capture Designer.<br>• The file with the global options is uploaded to the Intelligent Capture Server whose installed CaptureFlow you set up.<br>For more information, see *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*. |

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Select templates based on</td><td>Specify which content will be displayed in the pick list of a document node in the Documents panel. Options:
<ul>
<li>Document Type: Default. The pick list displays document types selected from the recognition project. These document types must be uploaded on the server.</li>
<li>Template Code: The pick list displays template codes selected from the recognition project. Codes not associated with any of the templates are not presented in the pick list. However, a user will see the code <Undefined> in the list (this code is associated with the templates without a template code).</li>
</ul>
To fetch the required list items from the recognition project, configure the Allowed template codes filter (used by default) or the Allowed document types filter. For more information, see “Enabling the Operator to Perform Certain Tasks” on page 16.<br><br>
Note: Templates are not used in information extraction projects.</td></tr>
<tr><td>Identify pages by template code</td><td>Select this option to enable the manual template assignment by the template code.
<ul>
<li>If selected, the Template List panel is configured to hide the Template Name field and show the Code field only. Codes not associated with any of the templates are not presented on the Template List as well as the code <Undefined>. The operator sees and selects template codes. The Identification engine fetches all templates with the picked code and automatically selects one template that suits best for the given page. To set a default template when a template is not automatically matched, use Default template when there is no match.</li>
<li>If not selected (default), the Template List panel is configured to show both the Template Name field and the Code field. The operator selects templates from the Template List panel by name.</li>
</ul>
Note: Templates are not used in information extraction projects.</td></tr>
</table>

| Element | Description |
| --- | --- |
| **Warn when there is no matching template** | Select this option to display a warning to the operator stating that, in the selected template code, no template matched the image.<br>**Notes**<br>• **Identify pages by template code** must be enabled.<br>• Templates are not used in information extraction projects. |
| **Default template when there is no match** | Select one of the following to apply when no template is matched for the selected template code:<br>• **Recognition project's default template**<br>• **First template in the selected template code**<br>**Notes**<br>• **Identify pages by template code** must be enabled.<br>• Templates are not used in information extraction projects. |
| **Auto-assign templates** | Select this option to enable automatic template assignment mode.<br>• If selected, assigning a document type or a template code (whichever is configured in the **Select templates based on** setting) to a document triggers automatic reclassification of all pages in that document.<br>• If not selected, assigning a document type or code to a document does not affect page classification.<br>**Notes**<br>• This option applies if Identification is triggered at the Document level (level 1) or higher.<br>• Templates are not used in information extraction projects. |

| Element | Description |
| --- | --- |
| **Auto-assign template order** | This setting configures automatic template assignment. Specify the parameter by which templates selected for automatic assignment will be sorted in ascending order. Options:<br>• **Template Id**: Default. The array of templates is sorted by the template Id.<br>• **Template Name**: The array of templates is sorted by the template name.<br>**Notes**<br>• If you provide a custom script for the `DocumentIdentified` event, then the script will receive the template array sorted as specified by this setting.<br>• Templates are not used in information extraction projects. |
| **Filter template list by current document classification** | Select this option to refilter the **Template List** panel each time the operator clicks a different document in the **Documents** panel or displays a page belonging to a different document.<br>• If selected, the **Template List** panel is refiltered to show templates belonging to the document type or template code of the active document. Other templates are hidden. If the document is not assigned a document type or a template code, all templates are displayed.<br>• If not selected, all templates are displayed.<br>**Notes**<br>• This option applies if Identification is triggered at the Document level (level 1) or higher.<br>• Templates are not used in information extraction projects. |
| **Warn if the selected document classification does not contain templates** | This setting configures automatic template assignment. Select this option to display a warning message to the operator at the attempt to classify a document with a document type or template code that does not have associated templates.<br>**Note:** Templates are not used in information extraction projects. |

| Element | Description |
|---|---|
| **List most recently used first** | For recognition projects, templates in the **Template List** panel are displayed as follows:<br>• If selected, the **Template List** panel displays up to five most recently used templates on top, followed by other templates sorted alphabetically.<br>• If not selected, the **Template List** panel displays all templates sorted alphabetically.<br><br>For information extraction projects, the document types list displays the five most recently used document types on top, followed by other document types sorted alphabetically; otherwise, the document types are sorted alphabetically. |
| **Search items that begin with entered text** | Select this option to set the default for the **Start typing to filter** field to filter on text with which the template name or code must start; otherwise, the filter text can appear anywhere in the template name or code. Also selects template list settings > **Search items that begin with entered text**.<br><br>**Note:** Templates are not used in information extraction projects. |
| **Show template sample image** | • Select this option to show the sample image of the selected template in the **Template Preview** panel.<br>• If not selected, the sample image is not displayed.<br><br>**Note:** Templates are not used in information extraction projects. |

## Related Topics:

*OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*

*OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*

### 2.3.4 Defining the Available Flagging Reasons

Specify the list of page flags and/or document flags that will be available to the operator.

By default, a single flag is provided for documents with the **Rejected** flagging reason. Depending on your business needs, you can remove the default flag, or add more flagging reasons for documents and/or pages. If you define only one flag (for pages or for documents), the operator will be able to set and remove it with a single command, without posting the **Reason for Flagging** dialog. For instance, the default configuration (**Rejected** flag) allows the operator to reject documents by flagging them.

To specify a flag for pages or documents, add it to the **Flag reasons for pages** or **Flag reasons for documents** list, respectively. Use the following format:

*<Display name>* (*<InternalName>*[:*<shortcutChar>*]).

- The display name is the descriptive flagging reason to be displayed to the operator.
- The internal name is intended for scripting and regular expressions.
- The shortcut key (one character) is optional.

Example: `Too Dark (TooDark)` or `Too Dark (TooDark:D)` (with a shortcut key specified)

**Note:** When adding flags to each list, follow the same format – with or without a shortcut. If you do not specify shortcut keys for all flags in the list, the default characters will be assigned. If you mix both formats, flags specified without the shortcut key will be displayed in the **Reason for Flagging** dialog without a shortcut character.

**Table 2-4: Identification Setup: Flagging Settings**

| Element | Description |
|---|---|
| **Do not classify flagged pages** | • Select this option to let the operator skip flagged pages from processing. The task is done when all pages are either classified or flagged.<br>• If not selected, all pages need to be classified, including flagged pages. |
| **Do not classify flagged documents** | • Select this option to let the operator skip pages in flagged documents from processing.<br>• If not selected, pages in the flagged documents need to be classified. |

| Element | Description |
|---|---|
| **Show prompt when flagging** | • Select this option to prompt the operator to continue or cancel the flagging operation.<br>• If not selected, the prompt dialog is suppressed. |
| **Flag reasons for pages** | Click the <*N*> **Options** link to edit the page flagging reasons that will be displayed to the operator in the **Reason for Flagging** dialog. Add each reason in a new line. The format of the flagging reason specification is described above.<br><br>Add all flagging reasons in the same format – with or without a shortcut. If all flagging reasons are defined without shortcuts, the default shortcuts will be generated at runtime. If shortcuts are defined for particular (not all) flagging reasons, only these shortcuts will be generated.<br><br>**Note:** You can override this setting for a step using the `AllowedPageFlags` IA value. In production, the assigned IA value will take precedence over the setting specified during step setup. |
| **Flag reasons for documents** | Click the <*N*> **Options** link to edit the document flagging reasons that will be displayed to the operator in the **Reason for Flagging** dialog. Add each reason in a new line. The format of the flagging reason specification is described above.<br><br>Add all flagging reasons in the same format – with or without a shortcut. If all flagging reasons are defined without shortcuts, the default shortcuts will be generated at runtime. If shortcuts are defined for particular (not all) flagging reasons, only these shortcuts will be generated.<br><br>**Note:** You can override this setting for a step using the `AllowedDocFlags` IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.<br><br>This option applies if Identification is triggered on or above the Folder level (level 2). |

### Recommendations and Use Cases

- Unless there is a specific reason to do otherwise, all Identification and Completion steps in a CaptureFlow should be configured with identical page and document flagging reasons and format. The reason is that when flagged pages and documents are routed to other steps, flags are transferred in values *`PageFlag`* and *`DocFlag`* as sequences of internal names. The display names and the shortcut characters are not passed to the next step. If the **Reason for Flagging** dialog of a given Identification or Completion step receives the flag's internal name and no definition, the operator will see that internal name; the shortcut will not be provided.
- If user-defined flags or flags for internal operator messages are required, consider enabling and instructing operators to use annotations.
- A task will complete even if it is flagged with errors. To ensure all flagged errors are fixed before the task is complete, route a task back to a supervisor or operator for completion when the `PageStatus.RemainingWork` IA value is greater than zero.

## 2.3.5 Options for IA Values, Collecting Statistics, and Scripting

**Table 2-5: Identification Setup: Advanced Settings**

| Element | Description |
|---|---|
| **Output IA value destination** | Specify output of document fields into flattened IA values in addition to the original UIM data structure. Options:<br>• **(Do not write to IA values)**: Do not flatten document fields into IA values. Document fields are output in their original structure only. This option works if output is further processed by a module that directly supports UIM data, such as Extraction, Completion, or Standard Export.<br>• <*Step name*>: Select the step into whose values the document data will be flattened. Output includes both UIM data and flattened data.<br>**Note:** The destination IA values must be pre-created. If document data includes array fields (table data), the number of items in the array is not known in advance, therefore, all destination IA values cannot be pre-created. Consider using the **Output dynamic values** option to enhance data flattening to dynamically created values.<br>**Notes**<br>• This option applies if Identification is triggered on or above the Document level (level 1).<br>• Not supported for information extraction projects. |
| **Output dynamic values** | If data flattening is enabled in the **Output IA value destination** setting, select this option to automatically create dynamic values for fields that do not have pre-created IA values.<br>If not selected, document fields are flattened into matching IA values (if such are found) and skips fields where no matching IA value is detected.<br>**Note:** Not supported for information extraction projects. |

| Element | Description |
|---|---|
| **Collect document type and templates statistics** | Select this option to log statistics in the `Template` and `DocumentType` tables in the Intelligent Capture database. These statistics, which are used in reports, are logged for document types and templates applied by the operator.<br><br>**Note:** If the Intelligent Capture database is installed on SQL Server Express or an internal database is used, this option is ignored and statistics are not logged. |
| **Collect field statistics** | Select this option to log statistics in the `Fields` table in the Intelligent Capture database. These statistics, which are used in reports, is logged for the data entry fields updated by the operator.<br><br>**Notes**<br>• If the Intelligent Capture database is installed on SQL Server Express or an internal database is used, this option is ignored and statistics are not logged.<br>• Pre-indexing is not used for information extraction projects. |
| **Custom value** | Enter an input string to be passed in to document type scripting. The format of this string is defined in scripting. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*. |
| **Script task class name** | This setting is used by document type scripting.<br><br>Specify the name of the .NET class for each type of a task derived from <*UimScriptTask*>. If this class is not specified in this setting, the global events in <*UimScriptMainCore*> will be invoked. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*. |

### 2.3.6 Collecting Statistics

Statistics of two kinds are logged: operator performance statistics and classification statistics.

#### Operator Performance Statistics

To collect performance statistics, the Identification step needs to be set up accordingly. By default, performance statistics is not collected.
Operator performance statistics is intended for end-user reporting purposes. The administrator can use it to track the operator productivity, particularly:

- The time spent per image (with the document type and the page template ID)
- The typing speed when indexing fields (keys per second)
- The number of manually classified documents and pages

Statistics on operator performance is collected in the Intelligent Capture database tables:

| Data | Database Table | Description |
|---|---|---|
| Template | `Tbl_ StatTemplate` | Stores information about the pages processed by the Identification module. You can use this data to improve extraction results for a particular page template. Information is divided by process to enable you to organize your data by line of business in cases where templates are shared. |
| Document Type | `Tbl_StatDocumentType` | Stores information about the documents processed by the Identification module. You can use this data to determine which document types take the longest time to process or have high reclassification rates. Information is divided by process to enable you to organize your data by line of business in cases where templates are shared. Capturing character counts enables accuracy measurement by calculating the percent of characters that were changed. |

| Data | Database Table | Description |
|---|---|---|
| Field | `Tbl_FieldStats` | Stores information about the fields changed in Identification; records are created only for fields that the operator changes. You can use this data to determine which fields take the longest time to process or have high data correction rates. Capturing character counts enables accuracy measurement by calculating the percent of characters that were changed. |

**Note:** These tables are updated by other modules as well. Each running module creates new records in the three reports tables as needed, but no less frequently than once per hour. The cumulative statistics for a given date and hour are computed by aggregating all rows for that time. To learn more about these tables, see *OpenText Intelligent Capture - Administration Guide (ECPCORE-AON)*.

Each table contains three fields (*ReportTag1*, *ReportTag2*, and *ReportTag3*) that can used to further divide the statistical data according to business needs. Identification exposes three IA values with the same names to let you pass string values to the database tables.

### Classification Statistics

Classification statistics is collected for Production Auto-Learning to improve automatic template-based page classification. This statistics is written to the *PageDataXml* IA value in the following data format:

```
<Page>
ClassificationTemplateID = Integer
ClassificationEditTemplateId = Integer
</Page>
```

Template ID set to “-1” indicates a page that has not been classified.

# 2.4 Setting Up Completion

These topics describe how to set up the Completion module.

## 2.4.1 Configuring Operator View and Workflow for Efficiency

**Table 2-6: Completion Setup: View and Navigation Settings**

| Element | Description |
|---|---|
| **View mode** | Define the layout displayed to the operator at launch. Values:<br>• **Image and Form**: Both the **Page View** and **Form** panels are displayed and all the menu items for **Image Only** and **Form Only**.<br>• **Image Only**: Only the **Page View** panel is displayed. The following menu items are enabled:<br>– **Page** > **Zoom In**<br>– **Page** > **Zoom Out**<br>– **Page** > **Default Zoom for Each Page**<br>– **Page** > **Pan Up**<br>– **Page** > **Pan Down**<br>– **Page** > **Pan Left**<br>– **Page** > **Pan Right**<br>– **Page** > **Auto Pan**<br>– **View** > **Form on Right** and **View** > **Form on Bottom**<br>In other view modes these menu items are hidden. The behavior of the **View** > **Form on Right/Form on Bottom** menu option (available or grayed out) is defined in the document type of the currently processed document:<br>○ If the **Default Form Position** document type setting specifies the **User Choice** option, the menu option is available.<br>The operator can re-dock the **Form** panel to the bottom or to the right edge of the main window. The selected layout is saved in the user preferences.<br>○ If the **Default Form Position** document type setting specifies the **Bottom** or **Right** option, the menu option is grayed out.<br>• **Form Only**: Only the **Form** panel is displayed. The **Documents** panel displays the list of documents; however, individual pages are not displayed.<br>The following menu items are displayed:<br>– **Document** > **Choose Type** |

| Element | Description |
|---|---|
| | – **View** > **Page List**<br>– **View** > **Summary** |
| **Work level** | Specify the work items that will be displayed to the operator, such as flags, fields that require manual confirmation, and validation errors. Options: **Manual**, **Character**, **Field**, **Document**. See “Setting the Work Level” on page 41 for more detail.<br><br>**Note:** If the **View mode** setting is set to **Image Only**, **Manual** is the only possible selection. |
| **Show manual confirmation** | Select this option to display as work items all fields that require manual confirmation. |
| **Intra-document page navigation** | Select this option to limit the shortcut navigation between pages in the **Documents** panel by the current document. The operator cannot navigate to the next page if it starts the next document or closes the preceding document.<br><br>When disabled, the operator can navigate through all pages of all documents in the **Documents** panel using the arrow buttons or key combinations **CTRL+SHIFT+J** (previous page) and **CTRL+SHIFT+K** (next page). |

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Auto-advance to next document</td><td>
Select this option to let the operator automatically advance to the next document after all work items in the current documents have been processed.
If selected:
<ul>
<li>By default, a prompt dialog box is displayed before proceeding to the next document. The operator can allow or suppress this prompt using the View > Prompt at > End of Document menu option. This setting is saved in the user preferences.</li>
<li>If the current document is the last document in the task, the behavior is defined by the Auto-advance to next task setting.</li>
</ul>
If not selected, the operator stays in the current document after all pages have been done. The View > Prompt at > End of Document menu option is not available.
Note: This option applies if Completion is triggered on the Folder level (level 2) or higher.
</td></tr>
</table>

| Element | Description |
|---|---|
| **Auto-advance to next task** | Select this option to let the operator automatically (without a prompt) get the next task after the current one is completed. If the current task still has work to be done, then the focus stays in the current field.<br><br>If selected:<br>• By default, a prompt dialog box is displayed before proceeding to the next task. The operator can allow or suppress this prompt using the **View** > **Prompt at** > **End of Task** menu option. This setting is saved in the user preferences.<br>• If the task includes multiple documents, the **Auto-advance to next document** option must be enabled; otherwise, the operator stays in the current task.<br>• However, the **Waiting for tasks from the batch: <***batch_name***>** dialog box is still displayed. To automatically close this dialog box after a specified number of seconds and return to the **Get Work** window, in `%appdata%\Local\Emc\InputAccel\Capture\UserPref\<username>_CPDSKTOP`, set the following parameter:<br>`TaskWaitScreenTimeout=<seconds>`<br>where <*seconds*> is an integer that represents the number of seconds to wait.<br><br>If not selected, the operator stays in the current task after it is completed. The **View** > **Prompt at** > **End of Task** menu option is not available. The operator must finish the task manually by pressing **F10**. |
| **Show document type change prompt** | Select this option to display the prompt when the operator picks a document type to be applied to a document.<br><br>If not selected, the prompt dialog is suppressed. |

| Element | Description |
|---|---|
| **Display image snippets** | Select this option to display a small image snippet near the focused field in the **Form** panel. The snippet shows the image area from which the value was extracted into the selected field. Image snippets help the operator validate and manually correct extracted fields quickly, without searching around the image.<br><br>When this option is selected, the operator can enable or disable image snippets using the **View** > **Image Snippets** menu command.<br><br>**Notes**<br>• **View mode** must be set to **Image and Form**, or **Form only**.<br>• Image snippets are displayed for document fields whose values were extracted from the image by the Extraction module. If you reassign any document field with a different value at runtime (in scripting or in the CaptureFlow chart), the field's extraction zone is deleted from the document data. When the document gets to the Completion step, the operator cannot see the image snippet for this reassigned field. |

### Related Topics:

“Setting the Work Level” on page 41

“Example: Setting View and Navigation for Particular Use Cases” on page 43

#### 2.4.1.1 Setting the Work Level

In terms of operator activities, work is a task (part of a batch) received by the operator from the server. Every work includes *work items* that the operator must address to complete the task. Work items include flags, fields that require manual confirmation, and validation errors.

Completion can be set up to limit work items displayed to the operator by a particular *work level*, as described in the following table. This table describes the types of work items to be corrected for each piece of work based on the work level defined during Completion setup. The first column identifies the work level, the second column identifies the validation errors the operator sees, and the third column identifies the types of flags to be processed.

**Table 2-7: Work Levels**

| Work Level | Work items displayed to the operator | | |
|---|---|---|---|
| | **Validation errors** | **Fields for manual confirmation (if the Show manual confirmation option is enabled)** | **Flags (if the Flag pages and documents option is enabled)** |
| **Manual**<br><br>(The operator enters data in the fields manually) | None | All fields are work items which are displayed regardless of the **Show manual confirmation** option and even if the field **Manual Confirmation** property is set to **Do Not Confirm** in the document type. | Field and page flags |
| **Character** | Validation errors for bad and low-confidence characters (returned by OCR) | Displayed based on the field **Manual Confirmation** property value. | Field- and page-level flags |
| **Field** | • Validation errors for bad and low-confidence characters (returned by OCR)<br>• Validation errors for fields, such as an incorrect date format<br>• Failed field-level validation rules. Any rule that has only one associated (dependent) field is considered a field-level rule. | Displayed based on the field **Manual Confirmation** property value. | Field- and page-level flags |

| Work Level | Work items displayed to the operator | | |
|---|---|---|---|
| | Validation errors | Fields for manual confirmation (if the Show manual confirmation option is enabled) | Flags (if the Flag pages and documents option is enabled) |
| **Document** | • Validation errors for bad and low-confidence characters (returned by OCR), fields, and documents.<br>• Validation errors for fields, such as an incorrect date format<br>• Failed document-level validation rules | Displayed based on the field **Manual Confirmation** property value. | Field, page, and document flags |

### 2.4.1.2 Example: Setting View and Navigation for Particular Use Cases

The following table illustrates how to set up the **View and Navigation** settings based on different business use cases. Only settings that affect the work item count are described.

**Table 2-8: Setup Options Based on Business Use Case**

| Based on your business need... | | | | Set up Completion as follows... | | | |
|---|---|---|---|---|---|---|---|
| **Use Case** | **Operator needs to...** | **Notes** | **Will low-confidence characters show?** | **Work Level** | **Show Form** | **Show Manual Confirmation** | **Flag Pages and Documents** |
| High-speed indexing | Navigate through each field (every field is work). Work is finished when the operator has either populated or confirmed every field. | No *OCR* | No | Manual | Yes | N/A | Yes or No |
| Image quality assurance | Look at each page to spot poor-quality images, then flag those pages. Work consists solely of setting or removing flags. | No OCR<br><br>No indexing | No | Manual | No | N/A | Yes |
| Manual classification, document assembly | Find the first page, separate the document, choose the document type, and enter or validate key fields. | No OCR<br><br>No prior indexing<br><br>Data entry form has few fields | No (because no OCR) | Field | Yes | Yes or No | Yes or No |

| Based on your business need... | | | | Set up Completion as follows... | | | |
|---|---|---|---|---|---|---|---|
| **Use Case** | **Operator needs to...** | **Notes** | **Will low-confidence characters show?** | **Work Level** | **Show Form** | **Show Manual Confirmation** | **Flag Pages and Documents** |
| High-speed character repair | Primarily fix characters. If the first page contains bad characters, flag the document and go to the next document. If the middle page contains bad characters, split the document just before the bad page, flag the new document, and go to the next document. | OCR was done, pages separated; may have separation errors<br><br>Data entry form may have many fields (10 or more) | Yes | Character | Yes | Yes or No | Yes |

| Based on your business need... | | | | Set up Completion as follows... | | | |
|---|---|---|---|---|---|---|---|
| **Use Case** | **Operator needs to...** | **Notes** | **Will low-confidence characters show?** | **Work Level** | **Show Form** | **Show Manual Confirmation** | **Flag Pages and Documents** |
| Field validation | Navigate through incorrectly populated fields. Ensure that the data in the fields is the same as on the image. | OCR is usually done, or prior indexing was done. Certain fields were already entered. Character repair may already be done.<br><br>Data entry form may have many fields (10 or more) | Yes | Field | Yes | Yes or No | Yes or No |
| Validate business rules | Perform internal validation checks, for example, the sum of the subtotals does not equal the total. | Same as field validation | Yes | Document | Yes | Yes or No | Yes or No |

## Related Topics:

"Configuring Operator View and Workflow for Efficiency" on page 36

## 2.4.2 Enabling the Operator to Perform Certain Operations

You can enable operators to perform certain operations.

**Table 2-9: Completion Setup: Permissions**

| Element | Description |
|---|---|
| **Edit fields** | Select this option to allow the operator to edit text in the data entry fields. |
| **Abandon changes** | Select this option to allow the operator to abandon changes through a prompt dialog if the task is canceled. If this option is not selected, the canceled task returns to the server with all changes saved; no prompt is displayed. |
| **Edit images** | Select this option to allow the operator to rotate images. **Page** > **Rotate** is enabled. |
| **Annotate images** | Select this option to allow the operator to annotate images and to edit and remove annotations added to images prior to the Completion step. **Page** > **Annotations** is enabled. **View mode** must be set to **Image and Form** or **Image Only**.<br><br>If not selected, the **Annotations** palette is unavailable. The operator cannot apply, edit, or remove annotations.<br><br>**Note:** Irrespective of this option, the operator can always see annotations on images in the **Page View** panel and on page thumbnails in the **Documents** panel. |
| **Copy pages** | Select this option to allow the operator to copy and paste pages in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Document level (level 1). |
| **Copy documents** | Select this option to allow the operator to copy and paste documents in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Folder level (level 2). |

| Element | Description |
|---|---|
| **Move pages** | Select this option to allow the operator to cut and paste pages within the current document and between documents in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Document level (level 1). |
| **Move documents** | Select this option to allow the operator to cut and paste documents within the current folder and between folders in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Folder level (level 2). |
| **Delete pages** | Select this option to allow the operator to delete unnecessary pages from documents in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Document level (level 1). |
| **Delete documents** | Select this option to allow the operator to delete unnecessary documents (with all pages) in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Folder level (level 2). |
| **Delete folders** | Select this option to allow the operator to delete unnecessary folders (with all documents) in the **Documents** panel.<br><br>**Note:** This option applies if Completion is triggered on or above the Stack level (level 3). |
| **Print pages** | Select this option to allow the operator to print pages and documents. **Document** > **Print** is enabled. If not selected, printing is disabled.<br><br>**Note:** View mode must be set to **Image and Form** or **Form Only**. |

| Element | Description |
|---|---|
| **Flag pages and documents** | Select this option to allow the operator to flag pages and documents. If not selected, flagging is disabled. **Document** > **Flag** is enabled.<br><br>**Note:** **View mode** must be set to **Image and Form** or **Form Only**. |
| **Allowed document types** | Click the **<*n*> options** link (and **Document** > **Choose Type**) to populate the list of document types. The operator will be able to assign a different document type from this list to any document during validation. Values:<br>• Leave the default value (`*`) to display all document types available on the server.<br>• Specify the document type names to be displayed to the operator. Add one document type per line, pressing **ENTER** to start a new line.<br>Use the wildcard (`*`) to add a group of document types. For example, `Invoice*` will result in all document types that start with `Invoice`. If a single document type such as `Invoice*` is defined, but no document types matching that filter exist, then the menu option is hidden.<br>• Clear the list to leave the pick list empty. The operator will not be able to change the document type.<br><br>**Note:** **View mode** must be set to **Image and Form** or **Form Only**.<br><br>Press **CTRL+ENTER** to close the edit box.<br><br>**Note:** Alternatively, the list of document types can be passed to the step's *`AllowedDocTypes`* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup. |

| Element | Description |
|---|---|
| **Organize documents** | Select this option to allow the operator to create empty documents and split and merge documents in the **Documents** panel. The following menu items are enabled:<br>• **Document>New Document**<br>• **Document>New Empty Document**<br>• **Document>Merge Document**<br><br>If not selected, these operations are not allowed. |
| **Show batch tree levels up to level** | Select this option to allow the operator to hide nodes above the specified batch level in the **Documents** panel. Options: levels 2 to 6. |
| **Allow organizing folders up to level** | Select this option to allow the operator to merge, split, and create nodes in the **Documents** panel on and above the selected level. The following menu items are enabled:<br>• **Document>Split>Split Folder**<br>• **Document>Merge>Merge Folder**<br><br>Values:<br>• Levels 2 to 6<br>• None: Disables merging, splitting, and creating nodes above the Document level (level 1). |

## 2.4.3 Defining the Available Flagging Reasons

Specify the flagging reasons that will be available to the operator. Completion provides default flagging reasons for fields, pages, and documents to cover the most typical situations when flagging may be needed. Depending on your business needs, you can add more flagging reasons to each set of flags, remove existing flags, or remove all flags.

All flagging reasons can be specified in the **Flag reasons for fields**, **Flag reasons for pages**, and **Flag reasons for documents** lists. To specify a flagging reason, use the following format:

```
<Display name> (<InternalName>[:<shortcutChar>])
```

- The display name is the descriptive flagging reason to be displayed to the operator.
- The internal name is intended for scripting and regular expressions.
- The shortcut key (one character) is optional.

Example: `Too Dark (TooDark)` or `Too Dark (TooDark:D)` (with a shortcut key specified)

If Completion defines multiple flagging reasons, the operator sees the **Reason for Flagging** dialog at any attempt to set or edit flags. If you define only one flag for fields, or pages, or documents, the respective object can be flagged with a single command or a sequence of keys; the **Reason for Flagging** dialog is not displayed. For instance, if you delete all default flags and add a single **Rejected** flag for documents, the operator will be able to set and remove it with a single command, without posting the **Reason for Flagging** dialog.

### Recommendations and Use Cases

- Unless there is a specific reason to do otherwise, all Identification and Completion steps in a CaptureFlow should be configured with identical page and document flagging reasons and format. When flagged pages and documents are routed to other steps, flags are transferred in values *`PageFlag`* and *`DocFlag`* as sequences of internal names. The display names and the shortcut characters are not passed to the next step. If the **Reason for Flagging** dialog of a given Identification or Completion step receives the internal name of the flag and no definition, the operator will see that internal name; the shortcut will not be provided.
- If user-defined flags or flags for internal operator messages are required, consider enabling and instructing operators to use annotations.
- A task will complete even if it is flagged with errors. To ensure all flagged errors are fixed before the task is complete, route a task back to a supervisor or operator for completion when the `PageStatus.RemainingWork` IA value is greater than zero.

### Completion Setup: Flagging Settings

**Flag reasons for fields**

Click the **<*N*> Options** link to edit the field flagging reasons that will be displayed to the operator in the **Reason for Flagging** dialog.

Default flagging reasons for fields include:

- **Value does not exist in database(NotExist)**
- **Information is unreadable(Unreadable)**
- **Value conflicts with other data(DataConflict)**

Add each reason in a new line. The format of the flagging reason specification is described above. Add all flagging reasons in the same format – with or without a shortcut. If all flagging reasons are defined without shortcuts, the default shortcuts will be generated at runtime. If shortcuts are defined for particular (not all) flagging reasons, only these shortcuts will be generated.

**Note:** You can override this setting for a step using the *AllowedFieldFlags* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.

**Flag reasons for pages**

Click the **<*N*> Options** link to edit the page flagging reasons that will be displayed to the operator in the **Reason for Flagging** dialog.

Default flagging reasons for pages include:

- **Too light(TooLight)**
- **Too dark(TooDark)**
- **Noise(Noise)**
- **Bent corner(BentCorner)**
- **Skewed(Skewed)**
- **Delete(Delete)**
- **Wrong image(WrongImage)**
- **Double feed(DoubleFeed)**

Add each reason in a new line. The format of the flagging reason specification is described above. Add all flagging reasons in the same format – with or without a shortcut.

**Note:** You can override this setting for a step using the *AllowedPageFlags* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.

**Flag reasons for documents**

Click the **<*N*> Options** link to edit the document flagging reasons that will be displayed to the operator in the **Reason for Flagging** dialog.

Default flagging reasons for documents include:

- **Research is needed(Research)**
- **Pages are missing(MissingPages)**
- **Rescan whole document(RescanDocument)**

Add each reason in a new line. The format of the flagging reason specification is described above. Add all flagging reasons in the same format – with or without a shortcut.

**Note:** You can override this setting for a step using the *AllowedDocFlags* IA value. In production, the assigned IA value will take precedence over the setting specified during step setup.

### 2.4.4 Options for IA Values, Abandoning Changes, Collecting Statistics, and Scripting

Configure advanced Completion settings, including passing document data to the next steps, collecting statistics, and other options.

**Completion Setup: Advanced Settings**

**Output IA value destination**

Specify output of document fields into flattened IA values in addition to the original UIM data structure. Options:

- **(Do not write to IA values)**: Do not flatten document fields into IA values. Document fields are output in their original UIM structure only. This option works if output is further processed by a module that directly supports UIM data, such as Extraction, Identification, or Standard Export.
- <*Step name*>: Select the step into whose values the document data will be flattened.

> **Note:** The destination IA values must be pre-created. If all document fields cannot be known in advance, consider using the **Output dynamic values** option to enhance data flattening with dynamically created values.

**Output IA value level**

If data flattening is enabled in the **Output IA value destination** setting, expand the drop-down list and select the level to which Completion will output the flattened document data:

- **Document Only**: Default. Select to output all document fields to IA values of level 1 (Document level), irrespective of the field levels specified in the document type.
- **Field Index Level Only**: Select to output document fields to IA values in accordance with the **Index Level** specified in the document type for each field.
- **Document And Field Index Level**: Select to use both approaches to output document data. If the document type specifies the above-document level for a field, such a field will be output to a document-level IA value and to another IA value of the level specified in the **Index Level** attribute.

> **Note:** When outputting to the index level, the Completion module can overwrite the preceding outputs with blank values.

**Allow import higher level values**

Select this option to propagate document data between tasks where the index level of the fields is higher than 1 (Document level). This option requires the **Output IA value destination** setting to enable flattening document data to values above the document level. Before loading a new task, data is propagated in accordance with the selected output destination and at the index level specified for this field in the document type.

For example, if the batch forms several tasks on the validation step, the first operator sets value <*A*> (level above 1) and uploads it to the batch, and the next operators receive tasks with this value <*A*> already set (exported from the batch) and populated to the document field.

**Note:** When using custom values as a destination, make sure that the step has the input UimDataImportMode IA value assigned properly to allow for binding index values higher that task level.

**Output array field**

If data flattening is enabled in the **Output IA value destination** setting, expand the drop-down list and specify how array (table) fields will be output:

- **Value Per Row**: Output each array item as a separate IA value with the `<FieldName>_<row #>` name where the row number starts at 1.
- **Value Per Array Field**: Output each table field (all rows) as a single `<CR><LF>` delimited string value with the `<FieldName>` name. The last item in the string is not followed by the delimiter.

In both cases, the number of table records is output to IA value `<TableName>_count`.

For example, a `Fruits` table includes the following fields and content:

| ID | Description |
|---|---|
| 1 | Orange |
| 2 | Apple |

If you select the **Value Per Row** option, the table content will be output as follows:

- `Id_1`=“1”
- `Description_1`=“Orange”
- `Id_2`=“2”
- `Description_2`=“Apple”
- `Fruits_count`=“2”

If you select the **Value Per Array Field** option, the table content will be output as follows:

- `Id`=“1<CR><LF>2”
- `Description`=“Apple<CR><LF>Orange”
- `Fruits_count`=“2”

**Save values when structure changes**

This setting configures the ability of the operator to cancel the task with the **Abandon changes** option in the prompt dialog box.

**Note:** This setting applies if the **Abandon changes** setting enables posting a prompt. Otherwise, the task returns to the server with all changes saved in silent mode.

Select this option to let the operator cancel the task with the **Abandon changes** option only if there were no task changes saved on the server immediately. These changes include deleting or moving pages, splitting, merging, cutting, or copying nodes, rotating or annotating pages. If any of those changes took place, the operator has no option to abandon changes. The prompt will show the notification about saving all changes; the **Abandon changed** option will be hidden.

If not selected, the operator always has an option to cancel the task with the **Abandon changes** option. If any of the task changes were saved on the server immediately, they are already applied to the batch and cannot be abandoned. Other changes such as indexed fields or flagging are abandoned.

**Output dynamic values**

If data flattening is enabled in the **Output IA Value Destination** setting, select this option to automatically create dynamic values for fields that do not have pre-created IA values.

If not selected, Completion flattens document fields into matching IA values (if such are found) and skips fields where no matching IA value is detected.

If data flattening is disabled in the **Output IA Value Destination** setting, this option is grayed out.

**Collect document type and templates statistics**

Select this option to log Completion statistics in the `Template` and `DocumentType` tables in the Intelligent Capture database. Statistics, which are used in reports, are logged for document types and templates applied by the operator.

**Note:** If the Intelligent Capture database is installed on SQL Server Express or an internal database is used, this option is ignored and Completion statistics is not logged.

**Collect field statistics**

Select this option to log Completion statistics in the `Fields` table in the Intelligent Capture database. Statistics. which are used in reports, are logged for the data entry fields updated by the operator.

**Note:** If the Intelligent Capture database is installed on SQL Server Express or an internal database is used, this option is ignored and Completion statistics is not logged.

**Custom value**
Enter an input string to be passed in to document type scripting. The format of this string is defined in scripting. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*.

**Script task class name**
This setting is used by document type scripting.

Specify the name of the .NET class for each type of a task derived from `UimScriptTask`. If this class is not specified in this setting, the global events in `UimScriptMainCore` will be invoked. For more information, see *OpenText Intelligent Capture - Scripting Guide (ECPCORE-PSC)*.

## 2.4.5 Collecting Document Type Statistics

Both the Extraction and Completion modules provide statistics. These statistics, which pertain to production data, can help you identify issues that affect productivity. You can:

- Measure operator productivity.
- Find classification problems: Identify pages for which classification failed or documents for which the document type was changed.
- Find extraction problems: Identify fields that contained low-confidence characters or for which the value was changed after extraction.
- Find throughput bottlenecks: Identify steps where extraction or validation were slow.

You specify whether statistical data is collected as part of the step configuration settings in each process. The Extraction module provides Setting Up Extraction. Completion provides Options for IA Values, Abandoning Changes, Collecting Statistics, and Scripting.

### 2.4.5.1 Where Data is Stored

Statistical data is stored in the following tables:

**`Template`**
Stores information about the pages processed by the Extraction module. You can use this data to improve extraction results for a particular page template. Information is divided by process to enable you to organize your data by line of business in cases where templates are shared.

**`Document Type`**
Stores information about the documents processed by the Extraction module and Completion. You can use this data to determine which document types take the longest time to process or have high reclassification rates. Information is divided by process to enable you to organize your data by line of business in cases where templates are shared. Capturing character counts enables accuracy measurement by calculating the percent of characters that were changed.

**`Field`**
: Stores information about the fields changed in Completion; records are created only for fields that the operator changes. You can use this data to determine which fields take the longest time to process or have high data correction rates. Capturing character counts enables accuracy measurement by calculating the percent of characters that were changed.

Each table contains three tags (`ReportTag1`, `ReportTag2`, and `ReportTag3`) that can be used to further divide the statistical data according to business needs. You can use these tags to capture separate data in cases where capture services are shared across an organization. For example, you could organize the statistics by functional area by setting `ReportTag1` to the functional area for each task, such as `Accounting` for one task and `Sales` for a second task. Another example might be to organize by geographical region such as `North America` versus `Europe`. You could group the statistics by these tags to show operator productivity for each functional area or geographical region.

**Note:** The string values you specify for these tags are written to the database exactly as entered. No processing is performed on the values. The tags are set by the IA process as task-level values with the same name.

Use these tags only when you need to further break down statistical data. Capturing additional, unused information increases the number of records in the database unnecessarily.

For information about the reports tables, see *OpenText Intelligent Capture - Administration Guide (ECPCORE-AON)*.

### 2.4.5.2 How Data is Captured

Each running module creates new records in the three reports tables (`Template`, `Document Type`, and `Field`) as needed, but no less frequently than one per hour. The cumulative statistics for a given date and hour are computed by aggregating all rows for that time.

**Example:** The number of pages processed by Extraction on 1/23/2012 between 10:00 and 11:00 is the total of all records where the `Date` is set to `1/23/2012 10:00`.

Chapter 3

# Tasks

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

## 3.1 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 131.

**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.

### 3.1.1 Identification

1. To start Identification, click the Identification icon ( ) and then log in and get work. For more information, see “Getting Batches” on page 62.

   **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 69.

  – 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 78.
  – Resolve classification conflicts. For more information, see “Resolving Classification Conflicts (Identification Only)” on page 86.

- Flag documents, pages, or fields. For more information, see “Flagging Documents, Pages, or Fields With Reasons” on page 104.
- Annotate pages. For more information, see “Annotating Pages With Auxiliary Information” on page 108.
- Validate data. For more information, see “Validating Fields in Identification” on page 88.

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

   For more information, see:

   - “Finishing Tasks” on page 113
   - “Deferring Tasks” on page 114
   - “Stopping Work” on page 116

## 3.1.2 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 62.

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 74
   - "Flagging Documents, Pages, or Fields With Reasons" on page 104
   - "Changing the Documents Panel Layout" on page 125
   - "Shortcuts and Arrow Keys for Moving Around the Page" on page 142

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 62.

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 89
   - "Basic Rubberbanding" on page 103
   - "Table Data" on page 92
   - "Changing the Document Type" on page 101
   - "Flagging Documents, Pages, or Fields With Reasons" on page 104
   - "Annotating Pages With Auxiliary Information" on page 108

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

   For more information, see:

   - "Finishing Tasks" on page 113
   - "Deferring Tasks" on page 114
   - "Stopping Work" on page 116

## 3.2 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.

## 3.3 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:


## 3.3.1 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 |
|---|---|
| **Edit > Cut** | Cuts the selected folders from the batch and copies them to the Clipboard.<br><br>**Tip:** You can also perform a cut and paste action by dragging and dropping a folder with the mouse.<br><br>**Caution**<br>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. |
| **Edit > Paste** | Pastes folders after the selected folder. |
|  | Splits the folder at the selected document in the current folder as follows:<br>• The selected document and all of the documents following it are placed into a new folder, which is created after the current folder.<br>• All documents preceding the selected document are kept in the current folder.<br><br>(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.<br><br>**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). |
|  | Adds the documents of the selected folder to the preceding folder after the last document in the preceding folder; the current folder is deleted.<br><br>You select a folder by selecting either the folder node or a document in the folder. |

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

## 3.3.2 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.<br><br>**Caution**<br>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.<br><br>To paste documents at the beginning of another document, select the document. |

| Icon/Menu Item | Description |
|---|---|
| <br>**Document** > **New Empty Document** | Inserts an empty document as follows:<br>• If the selected item is a document, then an empty document is inserted before the selected document.<br>• If the selected item is a folder, then an empty document is inserted as the first document in the selected folder.<br>**Notes**<br>• 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.<br>• 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 69. However, you can split and merge nodes above the document level if you have respective permission granted.<br>**Tip:** You might need a special empty document to collect pages that do not belong to any other document. |

| Icon/Menu Item | Description |
|---|---|
| <br>**Document > New Document** | Creates a new document by splitting the document at the selected page in the current document as follows:<br>• All pages preceding the selected page are kept in the current document.<br>• The selected page and all of the pages following it are placed into a new document (which follows the current document).<br>**Note:** The new document has the same document type as the current document; however, only the current document has the original field data. |

| Icon/Menu Item | Description |
| --- | --- |
|  | Adds the pages of the selected document to the preceding document after the preceding document's last page.<br><br>**Notes**<br>• You select a document by selecting either the document node or a page in the document.<br>• You can merge only documents that are in the same folder.<br><br>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.<br><br>**Caution**<br>• 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.<br>• 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:<br>– 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.<br>– 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** | Deletes the selected document.<br>**Caution**<br>After you delete a page, document, or folder, the modified batch structure is saved to the server immediately and cannot be reverted.<br>**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. |

### 3.3.2.1 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 3-1: Assembling Documents Automatically**

| Use Case | Description |
| --- | --- |
| *Case 1: The template contains a binding field* | 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.<br><br>**Note:** The **Documents** panel (page list mode) includes the **Binding Field** column that shows the binding value for each page.<br><br>To merge adjacent pages into the same document, the pages must meet the following merging criteria:<br>• Their templates have the same template code.<br>• They have the same binding field values or a blank value.<br>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.<br><br>Furthermore, all pages in the same document must meet the aforementioned criteria.<br><br>**Notes**<br>• 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.<br>• A page without a binding field is handled the same way as an attachment.<br>• 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 |
|---|---|
| | 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.<br><br>Attachments could be anywhere in a document, including the middle.<br>• Separator pages take precedence over binding field values. See “Case 3: A task includes classified separator pages and field binding” in this table.<br><br>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:<br>• If the current page is the first page in the document, then one of the following occurs:<br>  – 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.<br>  – 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.<br>• If the current page is the last page in the document, then one of the following occurs<br>  – 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.<br>  – 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 |
|---|---|
| | becomes the first page in a new document.<br>• 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. |
| *Case 2: A separator template is assigned or unassigned* | 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).<br><br>**Note:** Deleting a page with a separator template does not result in merging. |
| *Case 3: A task includes classified separator pages and field binding* | When a task includes classified separator pages and field binding, separator-based splitting and merging has a priority:<br>• If you assign a separator template to any page in the task, that page starts a new document.<br>• If you reassign a different template to a classified separator page, the binding rules apply. |

## 3.3.3 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 |
|---|---|
| **Edit** > **Copy** | Makes copies of the selected pages and moves them to the Clipboard. |

| Icon/Menu Item | Description |
|---|---|
| **Edit** > **Cut** | Cuts the selected pages from the document and copies them to the Clipboard.<br><br>You can also perform a cut and paste action by dragging and dropping pages with the mouse.<br><br>**Caution**<br>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 pages after another page, select the page.<br><br>To paste pages at the beginning of a document, select the document.<br><br>**Note:** New in 22.1, the following IA Values continue to be available after copying and can be pasted multiple times:<br>• *`AnnotationComment`*<br>• *`Backside`*<br>• *`Image`*<br>• *`ImageType`*<br>• *`OcrDataCache`*<br>• *`PageDataXml`*<br>• *`PageFlag`*<br>• *`Rotation`*<br>• *`SourceNodeID`*<br><br>For more information, see "IA Values" on page 165. |

| Icon/Menu Item | Description |
|---|---|
| **Edit** > **Delete** | Deletes the selected pages.<br><br>You can select pages in different documents.<br><br>**Caution**<br>After you delete a page, document, or folder, the modified batch structure is saved to the server immediately and cannot be reverted. |

## 3.4 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.

### 3.4.1 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 | <br>**Fit Height** | Fit the page height to the viewing pane. |
| Fit page in the pane | <br>**Fit Page** | Fit the page height and width to the viewing pane. |
| Fit the page width in the pane | <br>**Fit Width** | 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) | Auto Pan<br>CTRL + 5<br>**Auto Pan** | Activates or deactivates automatic panning.<br><br>For more information, see "Automatic Panning" on page 78.<br><br>**Note:** In Identification, automatic panning is not available for information extraction projects. |
| Open the image in a separate window (which could be on another monitor) | Pop out<br>**Pop Out** | Pop out the page view into a separate window (which could be on another monitor).<br><br>**Note:** Closing the window also returns it to the **Page View** pane. |
| Set default zoom | | The default zoom for the **Page View**.<br><br>Click the triangle to select the default zoom.<br><br>To deactivate or activate default zoom, click the magnifying glass.<br><br>You can also use **Page** > **Default Zoom for Each Page** and **Page** > **Set Default Zoom to**.<br><br>**Notes**<br>• This default applies to other tasks and in other work sessions as well as the current one.<br>• If the default zoom is not specified, then the last used zoom setting is used. |

| Action | Icon/Tooltip | Description |
|---|---|---|
| Zoom out/in | | Zoom the view in or out. You can also select a specific percentage for the view.<br><br>**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. |
| Rotate the image counterclockwise 45 degrees | CTRL + 1 | Rotate counterclockwise 45 degrees.<br><br>**Caution**<br>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. |
| Rotate the image clockwise 45 degrees | CTRL + 3 | Rotate clockwise 45 degrees. |
| Rotate the image clockwise 180 degrees | CTRL + 0 | Rotate 180 degrees clockwise. |

### 3.4.2 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 3-2: Zooming the Image Area**

| To Do This | Perform These Steps |
|---|---|
| Zoom the selected image area to the full screen | 1. Draw a rectangular area on the image with the mouse cursor, keeping **SHIFT** and the secondary (right) mouse button pressed.<br>2. Release the mouse button to view the selected area zoomed to the full screen. |
| Move the zoomed area | 1. Click inside the zoomed area.<br>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:<br> |
| Resize the zoomed area | Put the mouse cursor over one of the four edges or borders. Drag the corners or borders of the zoomed area with the mouse.<br><br>Alternatively, resize the zoomed area using the **CTRL+PLUS** and **CTRL+MINUS** key combinations. |
| 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. |

### 3.4.3 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 142

## 3.5 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.

### 3.5.1 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 3-3: 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.<br>1. Click the **Show recommended** button to show only recommended templates and hide the rest.<br>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. | 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.<br>**Note:** This option is not provided if the **Template List** panel shows the **Code** column only.<br>1. To show the recently used templates on top, expand the **Template List** panel settings and select **Most recently used first**.<br>**Note:** This filter can be activated in the application settings, in which case you will see this option selected |

| Icon | Template status | Description | Recommended steps |
|---|---|---|---|
| | | | automatically.<br>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). |

2. (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.

3. (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.

4. (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.

5. 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.

6. 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.

7. 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 86

"Validating Fields in Identification" on page 88

### 3.5.2 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 79.

**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 79

"Assigning Templates Automatically" on page 85

## 3.6 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.

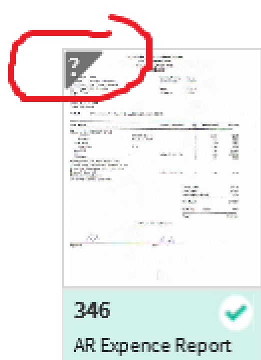



**Figure 3-1: Identification classification conflict**

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:

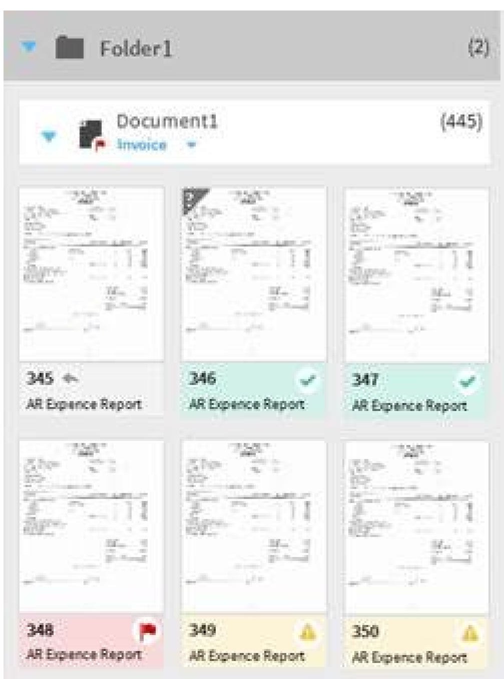



**Figure 3-2: Page classified as separator**

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

## 3.7 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 3-4:**

| 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:<br>• Select the value in the field and do the editing.<br>• Set the focus on the field and rubberband the image value.<br>• 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.

## 3.8 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 88.

### 3.8.1 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 3-5:**

| 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 |
| --- | --- | --- |
| The value in the field differs from the image value, or the field is blank. | The data extraction failed. | Use the option that suits best:<br>• Select the value in the field and do the editing.<br>• Set the focus on the field and rubberband the image value.<br>• If an image snippet appears near the selected field, type the displayed value into the field.<br>• If multiple fields in the **Form** panel show the same issue, consider changing the document type.<br>Depending on how your designer has configured fields with a drop-down value list, you could be provided with assistance in the following ways:<br>• When you first start typing in the field, the drop-down list is automatically expanded.<br>• 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:<br>1. A value in the list has a matching string at the beginning.<br>2. A value in the list has a matching string anywhere.<br>**Note:** Only one of these matching criterion could be applied or both of them could be applied in the given sequence. |

| 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. |

3. 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.

#### 3.8.1.1 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.

#### 3.8.1.2 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.

### 3.8.2 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.

### 3.8.2.1 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.

### 3.8.2.2 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 3-6: Inserting and Deleting Table Rows**

| To Do This | Perform These Steps |
|---|---|
| Insert a row in a table | 1. Click inside the row above which you want to insert a new empty row.<br>2. Select **Table** > **Insert Row**. |
| Delete one or more rows from a table | 1. Click inside the row that you want to delete. You can select multiple rows using the row selection column.<br>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.<br>1. Click inside any row of the table.<br>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.<br>1. Select one or more rows to move using the row selection column.<br>2. Select **Table** > **Move Row Up** or **Move Row Down**, as desired. |

<table>
<tr><th>To Do This</th><th>Perform These Steps</th></tr>
<tr><td>Merge table rows</td><td>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.<br>1. Select Table > Grid View.<br>2. If necessary, clear incorrectly read values.<br>3. Click inside the row below the one with which you want to merge.<br>4. Select Table > Merge with Previous Row.<br><br>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.<br><br>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.</td></tr>
</table>

### 3.8.3 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.

### 3.8.3.1 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.

#### 3.8.3.2 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.

#### 3.8.3.3 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 3-7: 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. |

#### 3.8.3.4 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.

### 3.8.3.5 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 3-8: 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 3-9: 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.

### 3.8.4 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 displays 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.

## 3.9 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.

### 3.9.1 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.

### 3.9.2 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 77

## 3.10 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:

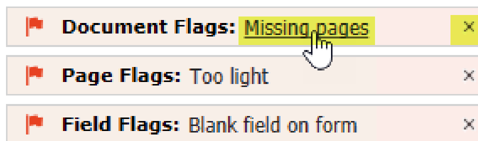

**Figure 3-3: Identification flag button**

### 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 114 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 114 option is enabled, flagging a document excludes all of its pages from classification. When you finish the task, flagged documents are not verified.

### 3.10.1 Applying and Removing Flags

| Icon/tooltip/keyboard shortcut | Action and tips |
|---|---|
| <br>**CTRL+G**<br>**Page** > **Flag**<br>**Document** > **Flag** | Displays the **Reason for Flagging** dialog box where you apply and remove the appropriate flags for the selected field, pages, or a document.<br>The flagged page or document is marked with a flag icon in the **Documents** panel.<br>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.<br>**Tips**<br>• Keyboard shortcuts are displayed next to the flagging reasons.<br>• Positioning the pointer over the flag icon displays the flagging reasons that have been applied.<br>• Flagging reasons are displayed in page view for the displayed page and to its parent document and the field with the focus.<br>**Notes**<br>• If a page flag is applied to a document, then the selected page in that document is flagged instead.<br>• If a document flag is applied to a page, then the parent document is flagged instead.<br>• If only one flag is available, then applying the flag results in the following:<br>– 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.<br>– 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 |
|---|---|
| | flag is applied to the rest of the selected pages.<br>– If the flag exists on all selected pages, then the flag is removed from all of them. |
| Flag messages in the page view panel<br> | Messages about flagged fields, pages, or documents are displayed in page view. You can perform the following actions:<br>• 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.<br>• To clear all page, document, or field flags, click the **X** icon for the corresponding flagged pages, documents, or fields. |

## 3.10.2 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 3-10: 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 | Do any of the following:<br>• Click the flagging reason with a mouse.<br>• Navigate through the list with the **DOWN** arrow key and press **SPACE** on the flagging reason.<br>• 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**. |

# 3.11 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.

## 3.11.1 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 3-11: 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 | 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.<br><br>**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. |
| Text | The specified text overlaid on the image. |
| Comment | The specified text added on the image as a popup comment. Comment annotations display when you position your pointer over the annotation.<br><br>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. |

## 3.11.2 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 3-12: 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 Thickness | Line weight | | 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 emphases, 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.

## 3.11.3 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.

## 3.11.4 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.

# 3.12 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 113.

**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 3-13:**

| 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**<br><br>**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.<br><br>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**<br><br>**Note:** Can be enabled with any mode. | A task can be finished in any state. | Pages can be any color. |

## 3.13 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.

## 3.14 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 4

# Reference

Unless otherwise indicated, the information in this section applies to both Completion and Identification.

## 4.1 Visualizing PDF Documents

*PDF* pages can be displayed natively in Completion and Identification. Specifically, the module internally rasterizes a PDF page into an image to visualize its content in the module's window. The resolution of the image is determined upon the following sequence of considerations:

- If OCR data cache has been generated for the page, then the resolution value is taken from the data.
- If a document type has been assigned, the resolution value is taken from the corresponding Recognition project settings.
- Otherwise, the default 300 *DPI* resolution is applied.

Thumbnail images for PDF pages are generated by Completion and Identification with low resolution that is 96 DPI.

**IA Value Assignments**

To allow visualizing PDF content in Completion or Identification, the following IA value assignments must be valid for the module in a CaptureFlow:

- For an input page, *`<Completion>/<Identification>:0.Image`* must be set.

  For example, in case when **Identification** receives an input image from the **Image Converter** step, assign to *`Identification:0.Image`* the value *`ImageConverter:0.Level0_OutputImage`*.
- The type of the input page proceeded to Completion or Identification is *`"PDF"`* (or *`".PDF"`*) in the *`ImageType`* IA value. It can either be received from a previous step or set manually: *`<Completion>/<Identification>:0.ImageType`*.

**Limitations of PDF Visualization**

When visualizing PDF content in Completion or Identification, the following limitations apply:

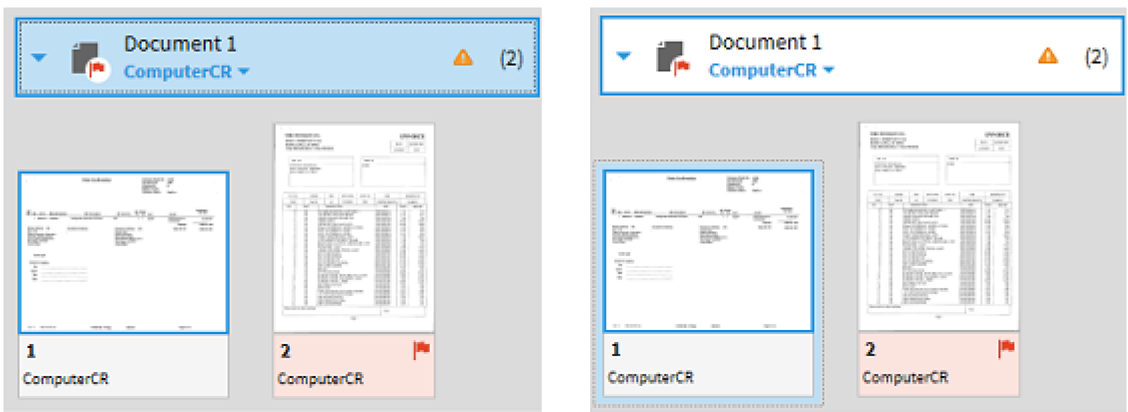
- For multi-page PDFs, only the first page is displayed.
- Annotations are not supported.
- Rotation is not supported:
  - in the page view mode, for a PDF page the rotation control is disabled;

– in the tree view mode, if multiple pages are selected and the selection includes pages of different formats, rotation will be applied to all pages except for PDF pages.

## 4.2 Selection Indicators

In the **Documents** panel, the color and shading of a node and its frame indicate its selection state:

**Note:** The following figure is from Completion; Identification is similar.




(1) (2)

**Table 4-1: Task Items: Navigation Status**

| Status | Indication | Description |
|---|---|---|
| **Selected** | Light blue shading or frame | This status indicates a page or a group of pages, or a node above the page level for which you can expand the context menu and apply any allowed menu command.<br><br>The selected pages appear in a light blue frame (Figure 2: Page 1) and a selected node above the page level has light blue color shading (Figure1: Document 1). |

| Status | Indication | Description |
| --- | --- | --- |
| **Active** | Dark blue frame | This status indicates a page currently displayed in **Page View** panel (Figure 1, 2: Page 1) and the parent document of this page (Figure 1, 2: Document 1). If you collapse the parent document, the frame indicates an active document, that is, a document whose page is being displayed.<br><br>The **Page** or **Document** menu commands can be applied to an *active* page or document, respectively. |
| **Focused** | Black dotted frame | This status indicates the focused node (Figure 1: Document 1; figure 2: Page 1). The frame appears when you click the node or navigate through the task using shortcut keys. |
| **Pointed** | Light gray frame | Appears when you position your pointer over the item. A document or a higher-level item displays a tooltip. |

You can select nodes with a mouse or using shortcut keys. When you select a single page or document in any of these ways, it becomes *selected* and *active*. If you select a node above the document level, it just becomes *selected*. Nodes above the document level never appear in the *active* state. Notice the following:

- A page in the *active* state is displayed in the **Page View** panel. Its parent document becomes *active*.
- When you select a document or a higher-level node, the first page under this *selected* node becomes *active*, and its parent document becomes *active*.
- When multiple pages are selected, the last page in the selection becomes *active* (displayed), and its parent document becomes *active*.

## 4.3 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 4-2: 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. | The image snippets that appear near the validation fields in the **Form** panel (Completion) or **Index Fields** panel (Identification) are allowed or suppressed.<br><br>**Note:** This menu option can be grayed out, indicating that you have no permission to change the default configuration. |
| 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**. | **Note:** This menu option can be grayed out, indicating that you have no permission to change the default configuration. |
| 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**. | **Note:** This menu option can be grayed out, indicating that you have no permission to change the default configuration. |
| Show or suppress the prompt dialog when deleting a page | Select or clear **View** > **Prompt at** > **Delete Page**. | **Note:** Selecting **Don't show again** in the delete confirmation dialog box also clears the menu item. |
| Show or suppress the prompt dialog when deleting a document | Select or clear **View** > **Prompt at** > **Delete Document**. | **Note:** Selecting **Don't show again** in the delete confirmation dialog box also clears the menu item. |

| 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. | 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.<br><br>**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. | The layout of the main window is changed to display the **Form** panel docked to the bottom edge of the window.<br><br>**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. |

# 4.4 Changing the Documents Panel Layout

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

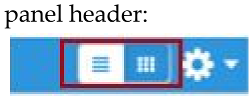
In Identification, you can switch between the following display modes to perform different operations:

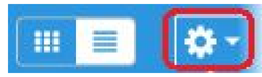
- Tree View: Displays the task as a multilevel structure in which pages constitute the lowest level, followed by documents and higher levels (if available). Pages are displayed as thumbnails. The tree view displays all task levels.
- Page List: Displays the task as a list of documents, each including 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 4-3: Adjusting the Documents Panel**

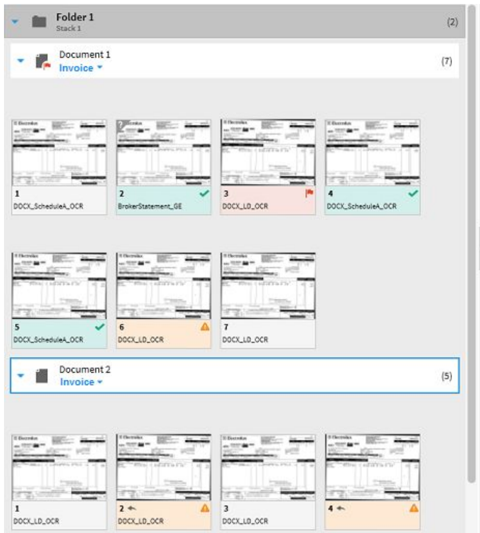
| To Do This | Perform These Steps |
|---|---|
| Expand or collapse all nodes above the page level | Do any of the following:<br>• Double-click any document in the **Documents** panel.<br>• Select **View** > **Collapse All Documents** or **View** > **Expand All Documents** from the menu.<br>• Press **F9**.<br><br>When expanded, the **Documents** panel displays all pages. When collapsed, the page level is hidden. |
| Expand or collapse a particular node above the page level | 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. |
| (Identification Only) Switch between the display modes | Click the respective icon in the **Documents** panel header:<br> |

| To Do This | Perform These Steps |
|---|---|
| Increase or decrease the thumbnail size | This operation is available in the tree view mode only.<br><br>1. Click the “settings” icon on the **Documents** panel header.<br>2. Adjust the thumbnail size to the required values.<br>The updated thumbnail size is remembered in the user preferences and applies to all next tasks, including in the next work sessions. |
| Hide levels above the selected one | This operation is available in the tree view mode only.<br>1. Click the “settings” icon on the **Documents** panel header.<br>2. Expand the **Show levels up to** list and choose the highest level to be displayed in the tree view.<br>The levels above will be hidden. |

## 4.4.1 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.

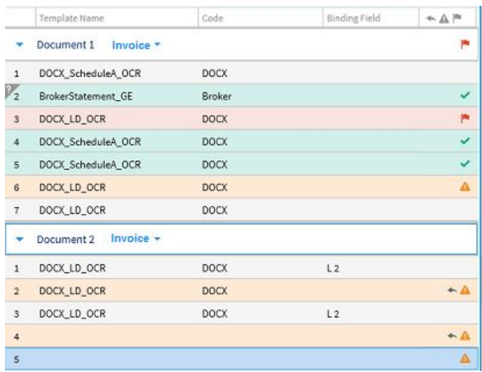
**Table 4-4:**

| Tree View Mode | Description |
|---|---|
|  | Every page shows its ordinal number in the document. If you replace the page, its ordinal number will be recalculated.<br><br>Nodes above the page level display:<br>• "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.<br>• 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**).<br><br>**Note:** You can see different node labels defined by your administrator.<br><br>• 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.<br><br>The classification status of pages and higher-level nodes is indicated by icons and color shading. Besides:<br>• Each classified page shows the name of the assigned template, for example, **DOCX_LD_OCR**.<br>• 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). |

### 4.4.2 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 4-5:**

<table>
<tr><th>List Mode</th><th>Description</th></tr>
<tr><td>
</td><td>Each page node displays the following data:
<ul>
<li>The ordinal number of the page in the document. If you replace or move the page, its ordinal number will be recalculated.</li>
<li>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.</li>
<li>Code: Classified pages show the code of the assigned template, for example, DOCX. Pages that are not classified show empty space.</li>
<li>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.</li>
<li>“Backside” icon: Optional. If visible, shows the “backside” icon for page backside pages and nothing for front-side pages.</li>
<li>Page statuses displayed as icons.</li>
</ul>
Each document node displays the following data:
<ul>
<li>“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.</li>
<li>The self-descriptive label (for example, Document) and the ordinal number of the document within the parent node.<br><br>Note: You can see a different label defined by your administrator.</li>
<li>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).</li>
</ul></td></tr>
</table>

| List Mode | Description |
| --- | --- |
| | • If the document is flagged, its status is indicated by the “flag” icon. |

## 4.5 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 | Select a document or node in the **Documents** panel and then select **Document** > **Print**.<br><br>**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:<br>• All pages in the selected document or node, or<br>• The pages that are selected. |
| Selected pages | Select pages in the **Documents** panel (**CTRL**+click, **SHIFT**+click) and then select **Document** > **Print**.<br><br>**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:<br>• All pages in the selected document or node, or<br>• The pages that are selected. |

| To Print | Perform These Steps |
|---|---|
| The current page | Select a page in the **Documents** panel and then select **Document** > **Print**.<br><br>**Notes**<br>• The **Current Page** option, which means that the current page is to be printed, is selected.<br>• 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 | 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.<br><br>**Note:** (Completion Only) If a document has a page filter, then only the pages shown in the **Documents** panel can be printed. |

# 4.6 Keyboard Shortcuts

This section describes the supported keyboard shortcuts.

## 4.6.1 Default Keyboard Shortcuts

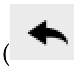
The following keyboard shortcut defaults are provided to make processing tasks more efficient. These shortcuts primarily use **CTRL** and **FUNCTION** keys and can be used from anywhere in the application interface and are not limited to the active window or panel.

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 4-6: 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** | 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.<br><br>**Note:** This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized. |
| **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** | 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.<br><br>**Note:** This is a standard keyboard shortcut that is common for many Intelligent Capture applications and cannot be customized. |
| **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** ><br><br>Split Folder<br><br>Split Folder up to Stack<br><br>Split Folder up to Level4<br><br>Split Folder up to Level5<br><br>Split Folder up to Level6 | **F4** | Applies to the current document only. |
| Change doc type | **CTRL+D** | Applies to the current document only. |
| **Merge**><br><br>Merge Folder<br><br>Merge Stack<br><br>Merge Level4<br><br>Merge Level5<br><br>Merge Level6 | **F3** | Applies to the current document or page only. |
| **Page** menu: | | |
| **Zoom In** | **CTRL+PLUS**<br><br>**CTRL+**mouse wheel up | Applies to the current page only. |
| **Zoom Out** | **CTRL+MINUS**<br><br>**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**<br><br>**Expand All Documents** | **F9** | |
| **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.<br><br>**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.<br><br>**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) | |

### 4.6.2 Shortcut for Switching Between Panels

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

**Table 4-7:**

| Target | Shortcut Key | Comment |
|---|---|---|
| Switch to the next or previous panel in the main window | **CTRL+TAB** (next)<br><br>**CTRL+SHIFT+TAB** (previous) | |
| Switch to the next or previous control inside the active panel | **TAB** (next)<br><br>**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 |

### 4.6.3 Shortcuts for Editing Text in Fields

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

**Table 4-8: 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). |

### 4.6.4 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 4-9: Navigating and Selecting Items in the Documents panel**

| To Do This | Perform These Steps | Comments |
|---|---|---|
| Navigate to a node in the **Documents** panel | Use the following shortcuts:<br>• **CTRL+HOME/END**: Move the focus to the top/ bottom tree node displayed in the **Documents** panel.<br>• **HOME/END**: Move the focus to the first/last node inside the parent node.<br>• **UP/DOWN**: Move the focus vertically to the upper/lower node through all currently expanded nodes.<br>• **LEFT/RIGHT**: Move the focus to the left/right page in the document. | The focus moves between the displayed nodes. The focused node gets *selected*. 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<br><br>(view or hide its child nodes) | Double-click the node, or click the “arrow” icon on the node bar.<br><br>Alternatively:<br>1. Set the focus to the required document or a higher-level node.<br>2. Press **LEFT** to collapse the node and **RIGHT** to expand it (view all child nodes). | |
| Expand or collapse all nodes<br><br>(view or hide all pages in the task) | Press **F9**. | |

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

## 4.6.5 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 4-10: 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 | Press **ENTER** or click  > **Next Work**. If the field requires confirmation, pressing **ENTER** confirms the field data.<br><br>**Notes**<br>• If the field requires confirmation, pressing **ENTER** confirms the field data.<br>• 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 | Click  > **Back**. The path leads backward through each field that was previously visited. |

| To Do This | Perform These Steps |
|---|---|
| Find a field | You can find a field in the **Form** panel by entering the field's label or the content in the field finder:<br>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.<br>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.<br>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.<br>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.

## 4.6.6 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 78

## 4.6.7 Windows Shortcuts

The following common Windows shortcuts execute the following operations:

**Table 4-11: Standard Windows Shortcuts**

| Operation | Shortcut Key | Description |
|---|---|---|
| Apply | **ENTER** | Activates the component, or the component element that has the focus.<br><br>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**<br><br>**F6** | Sets the focus to the next panel |
| Previous Panel | **CTRL+SHIFT+TAB**<br><br>**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. |

# 4.7 Identification

**Note:** Menu items, toolbar buttons, panels, and other information related to templates and indexing are not available for information extraction projects.

## 4.7.1 Main Window

**Table 4-12:**

| Panel | Description |
|---|---|
| Header bar | Displays the application name, the batch name, buttons for task management, and the name of the logged in operator. |
| Menu bar | Displays the following menu sections:<br>• **Previous** and **Next**: Includes the menu commands for navigating to the previous/next item in the focused panel, or to the previous/next document in the task.<br>• **Document**: Includes the menu commands that can be applied to an active document, such as splitting, merging, adding a new document, flagging, and printing.<br>Optional. Is hidden when a task has only one page and no other levels above it.<br>• **Page**: Includes the menu commands for adjusting the image in the **Page View** panel as well as for flagging, annotating, and printing the active page.<br>• **Edit**: Includes the menu commands for editing the task, such as cut, paste, copy, delete, and undo.<br>• **Template**: Includes the menu commands for assigning templates.<br>• **View**: Includes the menu commands for adjusting the main window. |

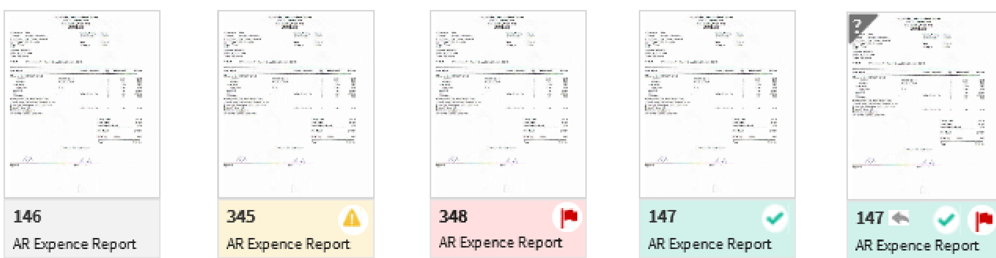
| Panel | Description |
|---|---|
| **Documents** panel | Displays the current task as a multilevel assembly with pages on the lowest level. Allows for selecting pages and higher-level nodes, modifying the task assembly (including the Clipboard commands and dragging), and applying operations on the selection.<br>• The toolbar displays buttons for processing pages and higher-level nodes and modifying the task assembly. The toolbar can be hidden.<br>• The context menu opened for the selection includes all allowed operations.<br>The view of the panel can be adjusted as described in “Changing the Documents Panel Layout” on page 125. You can hide and expand the panel. |
| **Page View** panel | Displays the page currently selected and active (marked with a dark blue rim) in the **Documents** panel. Allows for classifying, flagging, annotating, and printing the displayed page. The displayed image can be zoomed, panned, and rotated.<br>• The panel header indicates the location of the displayed page in the task structure: **<***Page #***> (<***Document #***>): <***assigned template***>**.<br>• The panel toolbar displays buttons for processing the displayed page and adjusting its view in the panel. The toolbar can be hidden.<br>• The message area at the bottom shows all flags applied to the displayed page and to its parent document. Clicking the page or document flags calls the **Reason for Flagging** dialog where you can set or remove flags. Also, flags can be removed from the page or document by clicking the “clear all” button.<br>You can dock the **Page View** panel or make it float. The floating panel is displayed in a separate window. |

| Panel | Description |
|---|---|
| **Annotations** panel | Appears when you enter the annotation mode by clicking the **Annotations** button in the **Page View** panel toolbar. The panel allows you to draw and edit annotations on the page as described in “Annotating Pages With Auxiliary Information” on page 108. The panel contains a palette of annotation types with default properties that you can configure for drawing repeated annotations quickly. |
| **Template List** panel | Displays templates that can be assigned to the displayed page as described in “Assigning a Template to a Page” on page 79.<br><br>The list of templates can be sorted alphabetically by any column and filtered by several parameters. |
| **Template Image** panel | Optional. Displays the sample image for the template currently selected in the **Template List** panel.<br><br>You can dock this panel or make it float. The floating panel appears when you position your pointer over it; otherwise, the panel is hidden. |
| **Index Fields** panel | Displays the fields that must be populated with data from the displayed page. These fields are specified by the template of the displayed page. Different pages within the same document may have a different set of fields.<br>• The field that requires attention gets the focus.<br>• The message area on top of the panel tells you how the focused field must be processed. When work is done, the message disappears.<br>• The image snippet displays the image area from which the value was extracted into the currently focused field. The image snippet is an optional element of the **Index Fields** panel, it can be hidden. |

| Panel | Description |
|---|---|
| Status bar | Displays the work status in the format:<br>• **Working On: All Batches (<#> Documents)** or **Working On:** <*batch name*> **(<#> Documents)**<br>• **Work Level:** <*task level*> \| **Remaining Work Items:** <#>/<#>: Indicates the task level (batch or lower) and remaining work items relative to all work items in the task. The examples of work items could be a page that requires a template or a field to be confirmed.<br><br>The progress bar displays your progress in the task. |

## 4.7.2 Page Status

The **Documents** panel uses special icons and color shading to inform you about the page status and about statuses of higher-level nodes.




(1) (2) (3) (4) (5)

**Figure 4-1: Identification page status**

**OK ("No work required", screen 1)**

When using the **Documents** panel in the tree view mode, the page thumbnail is decorated with the gray band that displays the page number in the document and the assigned template. When using the **Documents** panel in the page list mode, the page bar uses gray shading and displays the page number and the assigned template.

**IN ERROR ("classification needed", screen 2)**

A page in this status is not assigned a template, or any of its fields requires validation or contains invalid data. When using the **Documents** panel in the tree view mode, the page thumbnail is decorated with the yellow band with the triangle icon. The band displays the page number in the document and the assigned template. When using the **Documents** panel in the page list mode, the page bar uses yellow shading and the triangle icon and displays the page number and, optionally, the assigned template.

**FLAGGED ("flagged", screen 3)**
A flagged page can be in this status if the **Do not classify flagged pages** application mode is enabled. When using the **Documents** panel in the tree view mode, the page thumbnail is decorated with the red band with the flag icon. The band displays the page number in the document and, optionally, the assigned template. When using the **Documents** panel in the page list mode, the page bar uses red shading and the "flag" icon and displays the page number and optionally the assigned template.

**DONE ("classified", screen 4)**
When using the **Documents** panel in the tree view mode, the page thumbnail is decorated with the green band and the check icon and displays the page number in the document and the assigned template. When using the **Documents** panel in the page list mode, the page bar uses green shading and the check icon and displays the page number and the assigned template.

**Page thumbnail (screen 5)**
The page thumbnail or bar can display additional icons (screen 5) that do not indicate the page status.

- the **Backside** icon
- the **Flag** icon (if the default classification mode is used)
- the dark corner (classification conflict)

### 4.7.3 IA Values

Identification exposes a set of IA values that are declared in the `CPIDENTF.mdf` file. These `MDF` values fall into two groups:

- Values common for all Intelligent Capture client modules. Each module defines these values in its `MDF` file. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.
- Values specific for the Identification module.

**Note:** Although you can add custom variables to an `MDF` file, this file is overwritten each time you upgrade the product. It is recommended that you define custom values in a Capture Flow as described in *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*. Alternatively, you can create a custom `MDF` file to prevent your extra variables from being overwritten. Notice that if you modify the deployed `MDF` file, you are responsible to reapply your modification after each product upgrade.

The values specific for the Identification module are described in the following table:

**Table 4-13: Identification: IA Values**

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *AllowedDocFlags* | T | String, Input | If holds a non-empty string, overrides the **Document Flagging Reasons** value in the step setup settings.<br><br>The value is a semicolon-delimited list of “text/value” pairs formatted as in setup mode. For example: `Research needed(Research);Pages missing(MissingPages)` |
| *AllowedDocTypes* | T | String, Input | If set to a non-empty value, overrides the **Document Types** option (document types displayed to the operator in the **Choose Type** list) in the step setup settings.<br><br>The value is a semicolon-delimited list of document types that can use “*” as a wildcard. For example: `Tax*;Finance*`<br><br>(show all document types beginning with “Tax” or “Finance”) |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *AllowedPageFlags* | T | String, Input | If set to a non-empty value, overrides the **Page Flagging Reasons** list in the step setup settings.<br><br>The value is a semicolon-delimited list of “text/value” pairs formatted as in setup mode. For example: `Too light (TooLight);Too dark (TooDark)` |
| *AnnotationComment* | 0 | String, Output | A string containing a comma-delimited concatenation of all annotations of type “comment” added to a page. |
| *Backside* | 0 | Long, Input | An indication of the front- or backside of the page. Values:<br>• 0: Front side of the page<br>• 1: Backside<br><br>If not set, the page side is considered to be front. |
| *CharactersInvalid* | 0 | Long, Output | The total number of remaining questionable characters on the page. |
| *ClassificationID* | 0 | String, Input, Output | Stores the ID, which is created and used by information extraction to associate classification data with this image. |
| *DispatcherProjectName* | T | String, Input | If holds a non-empty string, overrides the **Recognition Project** option in the step setup settings. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *DocFlag* | 1 | String, Input, Output | When used as output, a string that represents flags assigned to the given document.<br><br>When used as input, a string that specifies new flags that are to be merged with the existing ones in UimData in the given document.<br><br>Flags are specified as comma-separated internal names. This string is passed between steps. For example: `MissingPages, RescanDocument` |
| *DocFlagged* | T | Long, Output | Holds "1" if the task includes at least one flagged document (with a non-empty *DocFlag* value); "0" otherwise. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *DocStatus* | 1 | DocumentStatus, Output | The summary of the field and page statuses collected for the document. Includes the following parameters (all of type Long):<br>• *FieldsUnconfirmed*: The number of unconfirmed fields.<br>• *FieldsInvalid*: The number of fields that failed single-field validation.<br>• *FieldsFlagged*: The number of flagged fields.<br>• *PagesFlagged*: The number of flagged pages.<br>• *TotalFlagged*: The total amount of flagged fields and pages, plus one if the document is also flagged.<br>• *CharactersInvalid*: The total amount of remaining low-confidence characters.<br>• *RemainingWork*: The total amount of *Flagged*, *FieldsUnconfirmed*, *FieldsInvalid*, *CharactersInvalid*, plus the number of fields failing multi-field validation rules |
| *FieldsInvalid* | 0 | Long, Output | The number of fields that failed validation on the page. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *FieldsUnconfirmed* | 0 | Long, Output | The number of unconfirmed fields on the page. |
| *Flagged* | 0 | Boolean, Output | An indicator of a flagged page. |
| *Image* | 0 | File, Output, Prefetch | A reference of the image file that stores the document page (one side). Required.<br><br>The referenced image is displayed to the operator in the **Page View** panel, it can be modified during the step execution, and then it is output. |
| *ImageType* | 0 | String, Input, Output | The extension of the file referenced by the *Image* value. If empty, the default value is *TIF*. |
| *InputPageDataXml* | 0 | String, Input | *XML* formatted statistics generated by Classification and passed to Identification. Includes for each page its template ID and data in pre-index fields. |
| *Level0_NeedClassificationEdit* | 0 | Boolean, Output | Holds "true" if this page needs to be classified by operator. |
| *NeedClassificationEdit* | 7 | Boolean, Output | Is "true" if at least one image in the task was not classified automatically and requires manual classification. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *OcrDataCache* | 0 | File, Input, Prefetch | A reference of the file with the full text OCR data cache created for the given page. Typically, this file is output by the Classification, StandardOCR steps. Optional. |
| *OutputPageDataXml* | 0 | String, Output | XML formatted statistics received in *InputPageDataXml* and extended with Identification operator input (template IDs and pre-indexed data). Is intended for the Collector step to be used by Production Auto-Learning (*PAL*). |
| *PageFlag* | 0 | String, Input, Output | A string with comma-separated internal names of the flags applied to the given page. This string is passed between steps. For example: `TooLight,Noise,Skewed`<br><br>If empty, indicates "success/no error" status of the page. |
| *PageFlagged* | T | Long, Output | Holds "1" if the task includes at least one flagged page (with the *Flagged* value set to "1"); "0" otherwise. |
| *RemainingWork* | 0 | Long, Output | The total amount of *FieldsUnconfirmed*, *FieldsInvalid*, *CharactersInvalid*. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| `ReportTag1`<br>`ReportTag2`<br>`ReportTag3` | T | String, Input | Tags for collecting statistics, which are used in reports. Optional. If a given Identification step is set up to collect statistics in database tables `Document Type`, `Template`, and `Field`, data in these tags is exported to each of these tables into fields `ReportTag1`, `ReportTag2`, and `ReportTag3`, accordingly. |
| `Rotation` | 0 | Long, Input, Output | The number of clockwise rotations by 90º applied to the original input image. Values:<br>• 0 - none<br>• 1 - the image was rotated by 90º (one click)<br>• 2 - the image was rotated by 180º (two clicks)<br>• 3 - the image was rotated by 270º (three clicks)<br><br>This value must be explicitly reset to 0 when the step is redone and the `Image` IA value is re-initialized. |
| `StepCustomValue` | T | String, Input | If holds a non-empty string, overrides the **Custom Value** option (input parameters for document type scripting) in the step setup settings. |
| `TemplateCode` | 0 | String, Output | The code of the template assigned to the given page. |

| IA Value | Level | Data Type, Specifier | Description |
|---|---|---|---|
| *UimDataImportMode* | T | Long, Input | This value defines how the indexing data input will be bound to *PageDataXml*. Values:<br>• 0: Do not bind additional data to the *PageDataXml* object<br>• 1: Bind input index values to the *PageDataXml* object |
| *UimDocumentType* | 1 | String, Input | The name of the document type assigned to the given document by the Classification step. |
| *UimDocumentType* | 0 | String, Input, Output | The name of the information extraction (IE) profile/document type the page is classified as. This value is set only when the recognition project uses information extraction. |

# 4.8 Completion

## 4.8.1 Main Window

The main window appears when you have selected a batch or all batches for processing. This section describes the main window panels.

**Table 4-14: Completion: Main Window Panels**

| Element | Description |
|---|---|
| Header bar | Displays the application name, the batch name, buttons for task management, and the name of the logged in operator. |

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Menu bar</td><td>Displays the following menu sections:
<ul>
<li>Previous and Next: Include the menu commands for navigating to the previous/next item in the focused panel, or to the previous/next document in the task.</li>
<li>Documents: Includes the menu commands that can be applied to an active document, such as splitting, merging, adding a new document, flagging, and printing. Optional, not displayed in the page mode.</li>
<li>Page: Includes the menu commands for adjusting the image in the Page View panel as well as for flagging, annotating, and printing the active page.</li>
<li>Table: Includes the menu commands for editing tables in the Form panel. If the Form panel includes no tables, all included menu commands are grayed out. Optional, not displayed in the page mode.</li>
<li>Edit: Includes the menu commands for editing the task, such as cut, paste, copy, delete, and undo.</li>
<li>View: Includes the menu commands for adjusting the main window.</li>
</ul></td></tr>
<tr><td>Documents panel (tree view)</td><td>Displays the current task as a multilevel assembly with pages on the lowest level. Allows for selecting pages and higher-level nodes, modifying the task assembly (including the Clipboard commands and dragging), and applying operations on the selection.
<ul>
<li>The toolbar displays buttons for processing pages and higher-level nodes and modifying the task assembly. You can configure the toolbar to be displayed or hidden.</li>
<li>The context menu opened for the selected nodes includes all allowed operations.</li>
</ul>
The view of the panel can be adjusted as described in “Changing the Documents Panel Layout” on page 125. You can hide and expand the panel.<br><br>
The Documents panel is not displayed in the page mode.</td></tr>
</table>

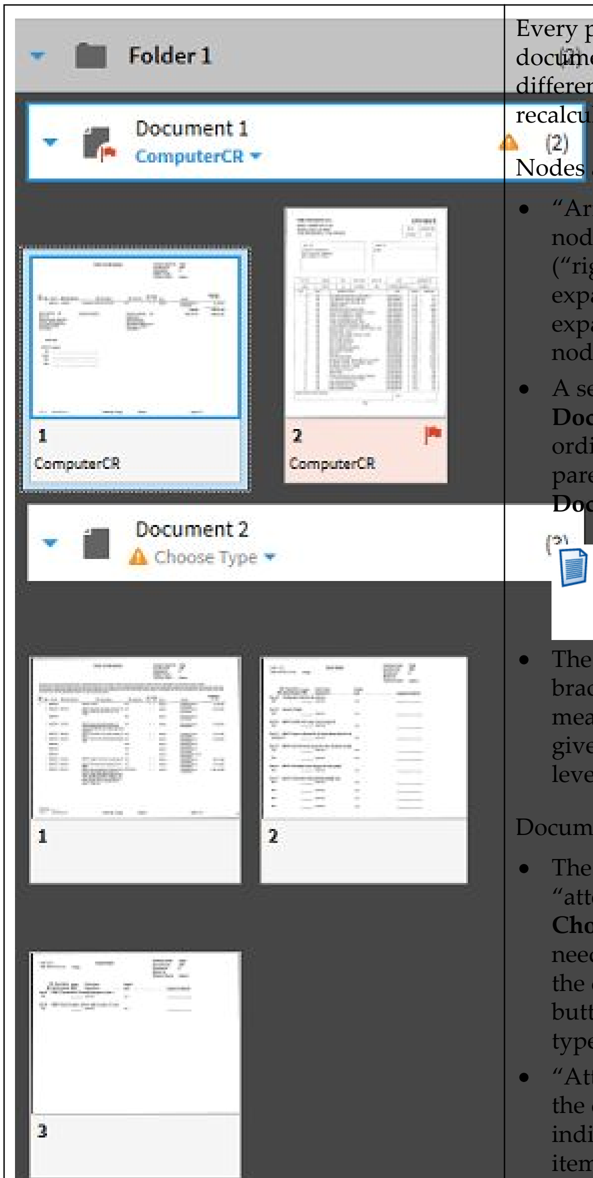
| Element | Description |
|---|---|
| **Page View** panel | Displays the page currently selected and active (marked with a dark blue rim) in the **Documents** panel. Allows for flagging, annotating, and printing the displayed page. The displayed image can be zoomed, panned (except in the page mode), and rotated.<br>• The panel header indicates the location of the displayed page in the task structure: **<***Page #***> (<***Document #***>)**. In the page mode, the header displays **CURRENT PAGE**.<br>• The panel toolbar displays buttons for processing the displayed page and adjusting its view in the panel. You can configure this toolbar to be displayed or hidden.<br>You can dock the **Page View** panel or make it float. The floating panel is displayed in a separate window. |
| Message bar | Displays:<br>• All flags applied to the currently selected field, to the displayed page, and to its parent document (if any). Clicking any flag calls the **Reason for Flagging** dialog where you can set or remove flags. Also, flags can be removed from the page or document by clicking the “clear all” button.<br>• Validation error messages for the currently selected field (for example, if manual confirmation is required or the field contains unrecognized characters). When a field contains multiple errors, the message bar displays one error at a time. After you correct each error, the next error message displays. |

| Element | Description |
| --- | --- |
| **Form** panel (data entry form) | Displays the data entry form where you need to validate index fields of the document selected in the **Documents** panel. The set of fields is specific for the document type that is shown on the document bar in the **Documents** panel.<br>• The image snippet displays an extracted portion of the original image near the validation field. Snippets let you quickly compare the original image to the extracted value shown in the field. Image snippets can be disabled in the application configuration settings. If available, you can configure image snippets to be displayed or hidden.<br>The **Form** panel is not displayed in the page mode. |
| **Annotations** panel | Appears when you enter the annotation mode by clicking the **Annotations** button in the **Page View** panel toolbar. The panel allows you to draw and edit annotations on the page. The panel contains a palette of annotation types with default properties that you can configure for drawing repeated annotations quickly. |
| **Summary** panel | Shows key index fields defined for the document. This panel is hidden in the annotation mode. |
| Status bar | Displays the work status in the format:<br>• **Working On: All Batches (<#> Documents)** or **Working On: <***batch name***> (<#> Documents)**. The document information is hidden in the page mode.<br>• **Work Level: <***task level***> \| Remaining Work Items: <#>/<#>**: Indicates the task level (batch or lower) and remaining work items relative to all work items in the task. The example of a work item could be a field that requires manual confirmation. This information is hidden in the page mode.<br>The progress bar displays your progress in the task. |

### 4.8.2 Documents Panel

The **Documents** panel displays the task as a tree structure where pages are shown as thumbnails and the higher-level nodes are shown as horizontal tabs.

**Table 4-15:**

<table>
<tr>
<td>


</td>
<td>
Every page shows its ordinal number in the document. If you move the page to a different position, its ordinal number will be recalculated.

Nodes above the page level display:

<ul>
<li>“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 the child nodes.</li>
<li>A self-descriptive label (for example, Document, Folder, and so on) and the ordinal number of the node within the parent node (for example, Folder1, Document2).<br><br>Note: You can see different node labels defined by your administrator.</li>
<li>The number of included child nodes in braces. For example, Document1 (2) means that the first document in the given folder (or in the task with no folder level) includes two pages.</li>
</ul>

Document nodes display:

<ul>
<li>The name of the document type, or the “attention” (yellow triangle) icon and the Choose type button if the document type needs to be identified manually. Clicking the document type or the Choose type button opens the pick list of document types for your choice.</li>
<li>“Attention” (yellow triangle) icon near the document's ordinal number that indicates that the document has work items to be completed.</li>
</ul>

A task can include filtered documents that indicate their status as follows:

<ul>
<li>The document node displays the “filter” icon that indicates a page filter:<br>

<br>The document displays only pages requiring attention; other pages are filtered off and not available in the task.</li>
</ul>
</td>
</tr>
</table>

| | |
|---|---|
| | The number of displayed pages relative to all document pages appears next to the “filter” icon. For example, **1 of (4)**.<br>• Pages in a filtered document show their ordinal numbers in the original (non-filtered) document. The displayed page numbers are fixed and cannot be changed. Pages cannot be moved.<br>**Note:** When a task has at least one filtered document, Completion enters the page filtering mode. |

### 4.8.3 Page Filters

A page filter indicates that a document includes only pages that require attention or manual validation. Documents with a page filter are displayed with the filter icon as follows:

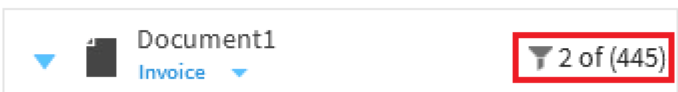



**Figure 4-2: Desktop page filter**

The count of the filtered pages comparative to the total amount of pages in the document is also displayed. Page indexes in the filtered document indicate the actual page number in the original document.

The filtered pages are marked with the attention (yellow triangle) icon as follows:

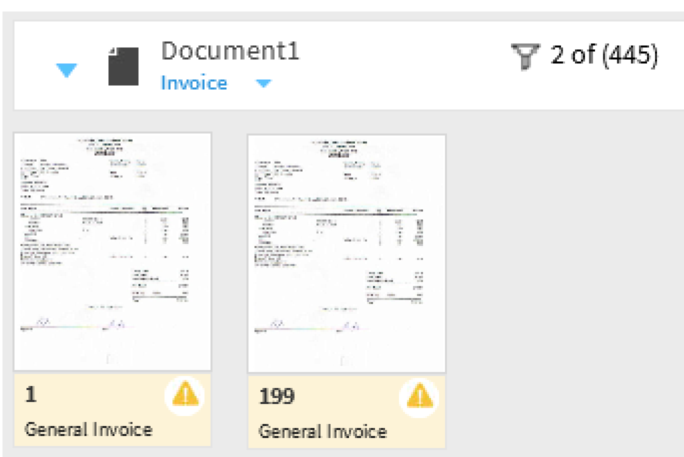



**Figure 4-3: Desktop page filter**

Pages that were filtered off are not included in the task. You cannot view these pages nor perform any operation on them.

In the task that includes filtered pages (also known as page filtering mode), you cannot modify (including moving and deleting pages) the task structure; however, validation of fields from the pages that were not included in the task and page rotation are allowed. You cannot disable page filtering mode and it remains in effect until you finish the current task and receive the next one that does not include any filtered documents.

### 4.8.4 IA Values

#### Integration Considerations for IA Values

Completion stores document data in a single *`UimData`* IA value that contains all fields in the document. Modules that support UIM data (such as Identification, Extraction, Standard Export) can read individual fields directly from this value; however, pre-7.0 modules cannot. To export data using modules that do not support UIM data, the document data must be written into a set of “flat” IA values with one value per field so that each value can be separately mapped in the export module. CaptureFlow Designer also requires one IA value per field if the document data is used for CaptureFlow tasks, such as choosing the next step in the CaptureFlow.

If you need individual values, you must configure them using the setup settings for IA values. During step configuration, you can choose to create values or to only populate existing ones. You can also specify the step destination into which the values should be written. For example, you can use custom values in CaptureFlow Designer when creating the CaptureFlow, which are then populated by the module. Another option is to use a separate data-only `MDF` that is populated by the module.

For more information on data flattening, see *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*.

#### IA Values

Completion exposes a set of IA values that are declared in the `CPDSKTOP.mdf` file. These `MDF` values fall into two groups:

- Values common for all Intelligent Capture client modules. Each module defines these values in its `MDF` file. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.
- Values specific for the Completion module.

**Note:** Although you can add custom variables to an `MDF` file, this file is overwritten each time you upgrade the product. It is recommended that you define custom values in a Capture Flow as described in *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)*. Alternatively, you can create a custom `MDF` file to prevent your extra variables from being overwritten. Notice that if you modify the deployed `MDF` file, you are responsible to reapply your modification after each product upgrade.

IA values that are specific to Completion are described in the following table.

- The **Level** column identifies the level of the batch where the given IA value is created and updated. Level <*T*> represents the level of the task (0 to 7).
- The **Type** column identifies the required data type for each IA value followed by the specifier (input and/or output).

**Table 4-16: IA Values for Completion**

| IA Value | Level | Type | Description |
|---|---|---|---|
| *AllowedDocFlags* | T | String, Input | If holds a non-empty string, overrides the **Document Flagging Reasons** value in the step setup settings.<br><br>The value is a semicolon-delimited list of “text/value” pairs formatted as in setup mode. For example: `Research needed(Research);Pages missing(MissingPages)` |
| *AllowedDocTypes* | T | String, Input | If set to a non-empty value, overrides the **Allowed Document Types** option in the step setup settings.<br><br>The value is a semicolon-delimited list of document types that can use “*” as a wildcard. For example: `Tax*;Finance*`<br><br>(show all document types beginning with “Tax” or “Finance”) |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *AllowedFieldFlags* | T | String, Input | If set to a non-empty value, overrides the **Field Flagging Reasons** list in the step setup settings.<br><br>The value is a semicolon-delimited list of “text/value” pairs formatted as in setup mode. For example: `Value does not exist in database (NotExist), Value conflicts with other data (DataConflict)` |
| *AllowedPageFlags* | T | String, Input | If set to a non-empty value, overrides the **Page Flagging Reasons** list in the step setup settings.<br><br>The value is a semicolon-delimited list of “text/value” pairs formatted as in setup mode. For example: `Too light (TooLight);Too dark (TooDark)` |
| *AnnotationComment* | 0 | String, Output | A string containing the comma-delimited concatenation of all comment annotations added to a page. |
| *Image* | 0 | File, Input, Output | A reference of the image file that stores the document page (one side). Required.<br><br>The referenced image is displayed to the operator in the **Page View** panel, it can be modified during the step execution, and then it is output. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *Backside* | 0 | Long, Input | An indication of the front- or backside of the page. Values:<br>• 0: Front side of the page<br>• 1: Backside<br><br>If not set, the page side is considered to be front. |
| *DocFlag* | 1 | String, Input, Output | When used as output, a string that represents flags assigned to the given document.<br><br>When used as input, a string that specifies new flags that are to be merged with the existing ones in UimData in the given document.<br><br>Flags are specified as comma-separated internal names. This string is passed between steps. For example: `MissingPages, RescanDocument` |
| *DocFlagged* | T | Long, Output | Is set to “1” if the task includes a flagged document indicated by a non-empty *DocFlag* parameter. Is set to “0” otherwise. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *DocStatus* | 1 | DocumentStatus, Output | An object that describes the status of the given document. Can be used for routing decisions in the CaptureFlow. This object is created when the task is closed, independent of whether it is completed or canceled, and is not automatically updated.<br><br>The document status includes the following properties:<br><br>• *CharactersInvalid* (Long): The number of remaining questionable characters. This is initially set during recognition, but a given operator may not finish all of them. If this value is non-zero, the document contains work that can be corrected by a step configured for "character" work level or higher.<br>• *FieldsInvalid* (Long): The number of fields that failed field-level validation. This number is "0" if there are no single-field validation errors in the document. If this number is other than "0", it contains work |

| IA Value | Level | Type | Description |
|---|---|---|---|
| | | | that can be corrected by a step configured for "field" work level or higher.<br>• *FieldsUnconfirmed* (Long): The number of unconfirmed fields.<br>• *FieldsFlagged* (Long): The number of flagged fields.<br>• *PagesFlagged* (Long): The number of flagged pages.<br>• *TotalFlagged* (Long): The number of flagged fields and pages, plus one if the document is also flagged.<br>• *RemainingWork* (Long): The sum of *FieldsFlagged*, *FieldsUnconfirmed*, *FieldsInvalid*, *CharactersInvalid*, plus the number of fields that failed document-level validation. Values:<br>– "0": The document is complete (has no remaining work) and ready for export.<br>– Other than "0": The document contains work that can be corrected by a |

| IA Value | Level | Type | Description |
|---|---|---|---|
| | | | step configured for the “document” work level. It might also contain work applicable to lower work levels; check the other status values to find out.<br><br>**Note:** Fields may be counted multiple times if multiple statuses apply. For example, if a field is both in error and has a flag, *`FieldsInvalid`* is “1”, *`FieldsFlagged`* is “1”, and *`RemainingWork`* is “2”, although only one field needs work. Routing decisions based on information in the document status should take this into account. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *FieldFlagged* | T | Long, Output | Is set to “1” if any document in the task has a flagged field indicated by a non-zero *DocStatus.FieldsFlagged* parameter. Is set to “0” otherwise. |
| *ImageType* | 0 | String, Input | File extension of the file referenced by the *Image* value. If empty, the default value is *TIF*. |
| *OcrDataCache* | 0 | File, Input, Prefetch | A reference of the file with the full text OCR data cache created for the given page. Typically, this file is output by the Classification, StandardOCR steps. Optional. |
| *PageDataXml* | 0 | String, Input, Output | *XML* formatted statistics generated by Classification or Identification . This value is typically passed to Completion from the *OutputPageDataXml* value of the preceding Extraction step.<br><br>Completion updates this XML data with bounds used in rubberbanding and values keyed in by the operator. The updated data can be passed to the Collector step to be used in Production Auto-Learning (PAL). |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *PageFlag* | 0 | String, Input, Output | A string with comma-separated internal names of the flags applied to the given page. This string is passed between steps. For example: `TooLight,Noise, Skewed`<br><br>If empty, indicates “success/no error” status of the page. |
| *PageFlagged* | T | Long, Output | Is set to “1” if any document in the task has a flagged page indicated by a non-empty *PageFlag* parameter. Is set to “0” otherwise. |
| *PagesToProcess* | 1 | String, Input | If a document has a page filter, this value holds a comma-delimited string with page numbers to be displayed to the operator. For example:<br>• “1”: Only page 1 is displayed.<br>• “3–5”: Pages 3, 4, and 5 are displayed.<br>• “L2”: The last two pages are displayed.<br>• “1,3–5,L2”: The combination of all above ranges is displayed.<br><br>If a document is not filtered, this value is empty. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *ReportTag1*<br>*ReportTag2*<br>*ReportTag3* | T | String, Input | Tags for collecting statistics, which are used in reporting. Optional. If a given Completion step is set up to collect statistics in database tables `Document Type`, `Template`, and `Field`, data in these tags is exported to each of these tables into fields *ReportTag1*, *ReportTag2*, and *ReportTag3*, accordingly. |
| *Rotation* | 0 | Long, Input, Output | The number of clockwise rotations by 90º applied to the original input image. Values:<br>• 0 - none<br>• 1 - the image was rotated by 90º (one click)<br>• 2 - the image was rotated by 180º (two clicks)<br>• 3 - the image was rotated by 270º (three clicks)<br>This value must be explicitly reset to 0 when the step is redone and the *Image* IA value is re-initialized. |
| *SourceNodeID* | 0, 1 | Integer, Output | If not empty, this value indicates that the given page or document has been copied from a different node. In this case, this value holds the ID of the original batch node. |

| IA Value | Level | Type | Description |
| --- | --- | --- | --- |
| *StepCustomValue* | T | String, Input | If holds a non-empty string, overrides the **Custom Value** option (input parameters for document type scripting) in the step setup settings.<br><br>Used as scripting parameters. If set to a non-empty value, overrides those values defined in the step setup. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *UimData* | 1 | String, Input, Output | A string representation of the document's UIM data. Pre-populating *UimData* is not mandatory, and this structure must not necessarily include extracted fields or rubberbanded zones.<br><br>If *UimData* is set for the task, it can contain:<br>• An empty string (no data). In this case:<br>– If *UimDocumentType* is blank: Users with the **Document Types** permission can choose the document type in Completion, which will define the `UimData` contents (with any newly-indexed values) that are written back to the IA value when the task is committed.<br>– If *UimDocumentType* is non-blank; Completion creates *UimData* for the document type with all values empty and writes it (with any newly-indexed values) back to |

| IA Value | Level | Type | Description |
|---|---|---|---|
| | | | the IA value when the task is committed.<br>• Extracted document fields.<br>• Values from the Extraction step and from the preceding Completion step(s) where `UimData.Document.FieldData.IsValueUpdated` indicates values changed by script. |

| IA Value | Level | Type | Description |
|---|---|---|---|
| *UimDataImportMode* | 1 | Long, Input, Output | The mode that defines or disallows additional data import to *UimData*. Input data is bound to the step regardless its index level. Allowed values are:<br>• “0”: Do not bind additional data to `UimData`.<br>• “1”: One-timely bind dynamic field data input to `UimData`.<br>The data should be in values `InUimData_`*<field>* or `InUimData_`*<field>*`__`*<Index>*. After the `InUimData` field has been copied into the *UimData* object, *UimDataImportMode* is reset to “0”.<br>• “2”: Always bind index values higher than the task level from the flattened output IA values back to *UimData*.<br>The data should be in values named exactly as their target fields: *<field>*. When the field is an array (table column), all array items are expected, separated with a new line. Additionally, the “per row” array values are supported: |

| IA Value | Level | Type | Description |
|---|---|---|---|
| | | | `<field>_<row>`. In case IA values contain both “per array” and “per row” flattened data, the last one takes precedence.<br>• “3”: The combination of modes “1” (“one-timely bind”) and “2” (“always bind”). After a value has been copied into the `UimData` object, `UimDataImportMode` is reset to “2”. In case of conflict between prefixed “one-time” and undecorated “always” values, the last one takes preference.<br><br>To learn more about data flattening and passing data between IA values and UIM data, see *OpenText Intelligent Capture - Designer Guide (ECPCORE-CPD)* . |
| `UimDocumentType` | 1 | String, Input | The name of the document type assigned to the document. Is used only if the document-level `UimData` is not set. |

# Glossary

**dpi**

Dots Per Inch

**OCR**

Optical Character Recognition

**PAL**

Production Auto-Learning

**PDF**

Portable Document Format

**TIF**

Tagged Image File file extension

**UNC**

Universal Naming Convention

**XML**

Extensible Markup Language