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This guide describes how to use Kofax Transformation Modules and is for use by keyboard operators correcting and validating data and batch structure. It provides a brief introduction to each of the modules and gives the instructions necessary to operate these modules.

The modules must be configured for a specific document set before use. This is done using the configuration tools and is not covered in this guide. If you need more detailed information on configuring a solution, read the Help. Complete details of the Kofax Transformation Modules documentation are included in the section Related Documentation.

This guide assumes that you have a thorough understanding of Windows standards and interfaces, and Kofax Capture.

To use this guide, briefly read the Overview section to gain an overall understanding of Kofax Transformation Modules. Then read the section that describes the specific module that you will be operating.

**Note** The Overview section is supplementary information, so you may wish to go directly to the section for the module you will be using.

### Related Documentation

In addition to this Kofax Transformation Modules User’s Guide, the following documentation is available.

**Installation Guide for Kofax Transformation Modules**

The installation guide provides instructions for installing Kofax Transformation Modules. In addition, it contains information about implementing your installation, certified operating systems, and other system requirements.

**Kofax Transformation Modules Configuration Guide**

The Kofax Transformation Modules Configuration Guide contains information about the configuration modules and how to use them, as well as detailed information about the technology provided with Kofax Transformation Modules.

**Help**

Kofax Transformation Modules Help is available from the application components as follows:

- From any of the Kofax Transformation Modules components, press F1, click Help from the toolbar, or select Contents from the Help menu.
- From any application window, press F1 or click Help to display context-sensitive Help information for the window.

**Help for Scripting**

Information about scripting is available from the Help menu of any Project Builder interface that enables you to write or access scripts.
Release Notes
Late-breaking product information is available from the release notes. Read the release notes carefully, as they contain information that may not be included in other Kofax Transformation Modules documentation.

Training
Kofax offers both classroom and computer-based training that will help you make the most of your Kofax Capture solution. Visit the Kofax Web site at www.kofax.com for complete details about the available training options and schedules.

Technical Assistance for Your Kofax Product
Support for your Kofax product is provided by your primary application support provider, which is specified as part of the maintenance agreement associated with your purchase. Please contact your Kofax application support provider for technical assistance with your Kofax product.

For more information about your product, visit the Kofax Support pages for:

- Product information and release news
- Access to the Kofax Knowledgebase
- Access to the online Web Incident Management Systems for eligible customers
- Downloadable product documentation

Before contacting your Kofax application support provider, please gather the following information where applicable:

- Product name, version, and serial number
- Log files
- Product license
- Exact error message(s)
- Reproduction scenario
This section introduces the components included with Kofax Transformation Modules, as well as their key features.

Kofax Transformation Modules provides additional automatic classification, separation, and extraction, as well as advanced user interactive functionality such as, indexing and validation to Kofax Capture.

Kofax Capture scans paper-based documents, creating a series of scanned image files. Alternatively, Kofax Capture Import Connector - Email can retrieve emails (including attachments) from a server. Kofax Capture then routes the files through Kofax Transformation Modules that separates pages into documents, classifies documents and extracts information. Within Kofax Transformation Modules these classification, separation and extraction results are presented for review by users. After all documents have been validated in the attended modules, the batch is analyzed to increase the recognition of documents with the same layout by an online learning algorithm. Finally, the accurate, validated data and images are exported to a back-end system using Kofax Capture.

Kofax Transformation Modules consists of a set of components, either Kofax Capture custom modules or additional tools. In this documentation, the components are also referred to by their module or tool name, omitting the product name as a prefix.

Module Order

The following diagram shows Kofax Capture as the platform for the Kofax Transformation Modules components, linking them together into the complete solution. The configuration tools are used to tailor the modules for the particular documents being processed.

![Module Order Diagram](image)

**Figure 1.1. Kofax Transformation Solution (All Modules)**

One of the key features of Kofax Transformation Modules is its flexibility. There are many different ways in which the modules can be configured, ensuring maximum accuracy and efficiency regardless of the type of documents being processed. Each solution is unique, features and modules documented in this guide may not be used in your solution. In addition, shortcut keys may have been changed or additional options implemented in your installation's configuration. Please ask your solution integrator which areas of functionality are relevant to you.

Components

Kofax Transformation Modules consists of a set of components, either Kofax Capture custom modules or additional tools.
Table 1.1. Configuration Tools

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kofax Transformation - Project Builder</td>
<td>A configuration tool that is used to develop, train, and test Kofax Transformation Modules configurations.</td>
</tr>
<tr>
<td>Kofax Transformation - Project Planner</td>
<td>A configuration tool that is used to manage document sets and configure trainable document separation.</td>
</tr>
<tr>
<td>Kofax Transformation - Synchronization</td>
<td>A setup component that is integrated into the Kofax Capture Administration module as a custom panel. It is used for linking Kofax Capture document classes and index fields to classes and fields in the Kofax Transformation project and is installed with Kofax Transformation Modules - Server.</td>
</tr>
<tr>
<td>Kofax Transformation - Knowledge Base Administration</td>
<td>A configuration tool that is used to create and maintain extraction Knowledge Bases.</td>
</tr>
<tr>
<td>Kofax Transformation - Service Configuration</td>
<td>A configuration utility that is used to set up and change settings for the Kofax Transformation Modules - Batch Processing Service and the Kofax Transformation Modules - Knowledge Base Learning Service. It is installed with Kofax Transformation Modules - Server.</td>
</tr>
</tbody>
</table>

Table 1.2. Server Modules

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kofax Transformation Modules - Server</td>
<td>A module that automatically separates a batch into documents and then classifies and extracts information from each document. It also groups documents into folders based on common features if foldering is enabled. To provide an in-between review step for document separation and classification, you can add two instances of this module to the Kofax Capture list of processing queues.</td>
</tr>
<tr>
<td>Kofax Transformation Modules - Knowledge Base Learning Server</td>
<td>A module that performs online learning tasks to improve recognition based on validation input for documents with unsatisfactory extraction results.</td>
</tr>
</tbody>
</table>

Table 1.3. User Interactive Modules

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kofax Transformation Modules - Validation</td>
<td>A user interactive module that is used to review extraction results for an entire document and to ensure that all information is valid. Documents can also be marked for online learning.</td>
</tr>
</tbody>
</table>
Kofax Transformation Modules User’s Guide

Table 1.4. Thin Client Modules

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kofax Transformation Modules - Thin Client Correction</td>
<td>A Web-based user interactive module that is used to review extraction results for individual fields and correct low confidence characters extracted with zonal OCR in a speed-optimized environment.</td>
</tr>
<tr>
<td>Kofax Transformation Modules - Thin Client Validation</td>
<td>A Web-based user interactive module that is used to review extraction results for an entire document and to ensure that all information is valid.</td>
</tr>
<tr>
<td>Kofax Transformation Modules - Thin Client Verification</td>
<td>A Web-based user interactive module that is used to double key critical data to ensure greater accuracy from extracted data.</td>
</tr>
</tbody>
</table>

Table 1.5. Other Tools

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kofax Transformation - Statistics Viewer</td>
<td>A tool that is used to monitor classification and extraction performance.</td>
</tr>
<tr>
<td>Kofax Transformation - XDoc Browser</td>
<td>A tool that is used to view and analyze extracted data within XDocs.</td>
</tr>
<tr>
<td>Kofax Transformation - OCR Server</td>
<td>A tool that is used to quickly create XDocs from batches of images to expedite configuration.</td>
</tr>
<tr>
<td>Kofax Transformation - Image Classifier</td>
<td>A tool that is used to quickly test image classification on large numbers of images.</td>
</tr>
</tbody>
</table>

Once Kofax Transformation Modules is installed, you can add the unattended and attended modules to any batch class already defined in the Kofax Capture Administration module. Typically, the Server module is placed directly after the Scan module and replaces the Recognition Server module in the Kofax Capture workflow. Documents are classified and processed for data extraction and then routed to the attended modules, Knowledge Base Learning Server and/or the Release module.

A Typical Kofax Transformation Solution

A typical Kofax Transformation solution has multiple dedicated stations for each module. For example, there may be a scanner station, stations automatically running Server and Knowledge Base Learning
Server, computers dedicated to running the Document Review module, several more computers running Correction, Validation, and Verification, and a Release station, as shown in the following illustration. Depending on the documents being processed and the requirements of the system, some modules in the Kofax Transformation Modules may not be used.

Figure 1.2. A Typical Kofax Transformation Solution

**Batch Processing**

When documents are first scanned they are collated into batches. These are sets of documents that can be processed efficiently as a unit through the transformation process. There may be a link between all the documents in a batch. For example, they may have all arrived from a specific site, or they may be independent. A typical batch contains between 50 to 500 documents.
Quick Tour of Document Review

Document Review has a menu and toolbar for quick access to various features and commands. In addition, a status bar is displayed along the bottom of the window and provides additional information. If the Document Viewer and Current Problem panels are visible, you can undock and reposition them.

![Batch 250 - Document Review](image)

Every document with a suggested class must be reviewed

Figure 2.1. Kofax Transformation Modules - Document Review Layout

**Menu Bar**

Document Review provides a standard, Windows-style menu bar with the following menus:

- Batch
- View
- Document
Batch Menu

The following options are available:

- Open - a list of available batches that you can open is displayed.
- Close - closes the current batch.
- Suspend - suspends the current batch.
- Exit - closes the module.

View Menu

The following options are available:

- Zoom In - increases the magnification of the selected page in the image viewer.
- Zoom Out - decreases the magnification of the selected page in the image viewer.
- Best Fit - fits the image size to the image viewer.
- Display Color Image - switches between the color and binary image of the document, if available.

Document Menu

The following options are available:

- First - navigates to the first document in the batch.
- Previous - navigates to the previous document in the batch.
- Next - navigates to the next document in the batch.
- Last - navigates to the last document in the batch.
- Change Class - opens the class list for the selected document.
- Confirm Class - confirms the class for the selected document.
- Reject - flags the selected document so it is sent to Quality Control and opens the Rejection Note window. Reject is enabled in the menu only when you have selected a document or page that is not already rejected.
- Unreject - removes the rejection flag for the currently selected document. Unreject is enabled in the menu only if you have selected a document that is already rejected.
- Delete Document - removes the selected document.
- Merge to Previous - combines selected documents that are located next to each other into a single document.
- Merge - combines selected documents into a single document. You may select any documents in the batch.
- Split before Current Page - splits the current document. This item is not available for the first document or page or if a document is a single page in length.
- Expand All - expands all documents in the Batch Content panel.
- Collapse All - collapses all documents in the Batch Content panel.
- Move to Top - moves the selected document to the beginning of the batch. This menu item is available only if the selected document is not the first document in the batch.
- Move Up - moves the selected document one position higher in the batch.
• Move Down - moves the selected document one position lower in the batch.
• Move to Bottom - moves the selected document to the end of the batch. This menu item is available only if the selected document is not the last document in the batch.
• Copy - copies the selected document to the clipboard.
• Paste - pastes the document from the clipboard after the currently selected document. Pasting a document does not clear the clipboard so you can repeat pasting as often as you want. Note that this command is enabled only if you copy a document and then select a document after which it can be pasted.

**Page Menu**

The following options are available:

• Delete Page - removes the selected page.
• Rotate Left - rotates the page 90° to the left.
• Rotate Right - rotates the page 90° to the right.
• Copy - copies the selected page to the clipboard.
• Paste - pastes the copied page from the clipboard to the currently selected document or page. Pasting a page does not clear the clipboard so you can repeat pasting as often as you want. Note that this command is enabled only if you copy a page and then select a document or page after which the clipboard can be pasted.
• Move to Beginning - moves the selected page to the beginning of the document. This menu item is available only if the selected page is not the first page in the document.
• Move Left - moves the selected page one position left in the document.
• Move Right - moves the selected page one position right in the document.
• Move to End - moves the selected page to the end of the document. This menu item is available only if the selected page is not the last page in the document.

**Problem Menu**

The following options are available:

• Previous Problem - navigates to the previous problem in the batch.
• Next Problem - navigates to the next problem in the batch.
• Override Problem - overrides the current problem and puts the document or batch into a valid state.
• Restore Problem - restores the problem state of the current document or batch.

**Options Menu**

The following options are available:

• Show Script - opens the Script Code window to debug the script. For debugging (for example, to set a breakpoint and then check the value of a variable), the option Activate script debugging must be enabled on the Batch Settings tab of the Settings window. Script debugging for the Document Review module may be made unavailable by your solution integrator.
• Select Language - enables you to select one of the available languages for the application.
• Settings - enables you to configure settings.

**Help Menu**

The following options are available:
- Contents - opens the Help for Document Review.
- About - shows information about Document Review.

**Context Menus**

Document Review Context menus allow quick access to many features when right-clicking the batch, folder (if folders are enabled), a document or page:

- **Document**
- **Page**

**Document Context Menu**

- Change Class - opens the class list for the selected document.
- Confirm Class - confirms the class for the selected document.
- Reject - flags the selected document so it is sent to Quality Control and opens the Rejection Note window. Reject is enabled in the menu only when you have selected a document or page that is not already rejected.
- Delete Page - removes the selected page.
- Delete Document - removes the selected document.
- Merge to Previous - combines selected documents that are located next to each other into a single document.
- Merge - combines selected documents into a single document. You may select any documents in the batch.
- Split before Current Page - splits the current document. This item is not available for the first document or page or if a document is a single page in length.
- Move to Beginning - moves the selected page to the beginning of the document. This menu item is available only if the selected page is not the first page in the document.
- Move Left - moves the selected page one position left in the document.
- Move Right - moves the selected page one position right in the document.
- Move to End - moves the selected page to the end of the document. This menu item is available only if the selected page is not the last page in the document.
- Move to Top - moves the selected document to the beginning of the batch. This menu item is available only if the selected document is not the first document in the batch.
- Move Up - moves the selected document one position higher in the batch.
- Move Down - moves the selected document one position lower in the batch.
- Move to Bottom - moves the selected document to the end of the batch. This menu item is available only if the selected document is not the last document in the batch.
- Copy Document - copies the selected document to the clipboard.
- Copy Page - copies the selected page to the clipboard.
- Paste - pastes the document from the clipboard after the currently selected document. You can repeat pasting as often as you want as long as you do not alter the copied page or document. This command is available only if you select a document after which it can be pasted.

**Page Context Menu**

- Delete Page - removes the selected page.
- Split before Current Page - splits the current document. This item is not available for the first document or page or if a document is a single page in length.
- Move to Beginning - moves the selected page to the beginning of the document. This menu item is available only if the selected page is not the first page in the document.
- Move Left - moves the selected page one position left in the document.
- Move Right - moves the selected page one position right in the document.
- Move to End - moves the selected page to the end of the document. This menu item is available only if the selected page is not the last page in the document.
- Copy Document - copies the selected document to the clipboard.
- Copy Page - copies the selected page to the clipboard.
- Paste - pastes the document from the clipboard after the currently selected document. You can repeat pasting as often as you want as long as you do not alter the copied page or document. This command is available only if you select a document after which it can be pasted.

**Toolbars**

The toolbars provide shortcuts to many menu items and gives quick access to all important features. Use the Batch toolbar to manage batches.

**Table 2.1. The Batch Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Open Batch](icon) | Open Batch
Displays the list of available batches so you can select one to open. |
| ![Suspend Batch](icon) | Suspend Batch
Suspends the current batch. |
| ![Close Batch](icon) | Close Batch
Closes the current batch. |

**Table 2.2. The Folder Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![First](icon) | First
Navigates to the first folder in the batch. |
| ![Previous](icon) | Previous
Navigates to the previous folder in the batch. |
| ![Next](icon) | Next
Navigates to the next folder in the batch. |
| ![Last](icon) | Last
Navigates to the last folder in the batch. |

Use the View toolbar to adjust the size of the image in the document viewer.

**Table 2.3. The View Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Zoom In](icon) | Zoom In
Increases the magnification of the current page. |
Use the Document toolbar to navigate between documents in the current folder (if folders are enabled) or a batch.

**Table 2.4. The Document Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Zoom Out Icon](image) | Zoom Out  
Decreases the magnification of the current page. |
| ![Best Fit Icon](image) | Best Fit  
Adjusts the size of the image displayed in the viewer. |

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![First Document Icon](image) | First Document  
Navigates to the first document in the folder or batch. |
| ![Previous Document Icon](image) | Previous Document  
Navigates to the previous document in the folder or batch. |
| ![Next Document Icon](image) | Next Document  
Navigates to the next document in the folder or batch. |
| ![Last Document Icon](image) | Last Document  
Navigates to the last document in the folder or batch. |
| ![Delete Document Icon](image) | Delete Document  
Deletes the selected document. Remember that you cannot delete the last document in a batch. |
| ![Move to Top Icon](image) | Move to Top  
Moves the selected document to the beginning of the batch. |
| ![Move Up Icon](image) | Move Up  
Moves the selected document one position higher in the batch. |
| ![Move Down Icon](image) | Move Down  
Moves the selected document one position lower in the batch. |
| ![Move to Bottom Icon](image) | Move to Bottom  
Moves the selected document to the end of the batch. |

**Table 2.5. The Page Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Rotate Left Icon](image) | Rotate Left  
Rotates the page 90° to the left. |
| ![Rotate Right Icon](image) | Rotate Right  
Rotates the page 90° to the right. |

**Important** Any existing field data is lost when a page is rotated.
Icons | Description
--- | ---
Delete Page | Deletes the selected page. If you delete the last page within a document you need to confirm deletion as then the document is deleted.
Move to Beginning | Moves the selected page to the beginning of the document.
Move Left | Moves the selected page one position left in the document.
Move Right | Moves the selected page one position right in the document.
Move to End | Moves the selected page to the end of the document.

Use the Problem toolbar to browse between problems, override problems, and restore the problem status on documents or the batch.

**Table 2.6. Problem Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Problem</td>
<td>Navigates to the previous problem in the batch.</td>
</tr>
<tr>
<td>Next Problem</td>
<td>Navigates to the next problem in the batch.</td>
</tr>
<tr>
<td>Override Problem</td>
<td>Overrides the current problem and puts the document or batch into a valid state. Override Problem is only enabled in the menu when you have selected a problem document or the batch.</td>
</tr>
<tr>
<td>Restore Problem</td>
<td>Restores the problem state of the current document or batch. Restore Problem is only enabled in the menu when you have selected a document or batch containing a problem that has been overridden.</td>
</tr>
</tbody>
</table>

**Customizing Toolbars**

You can customize the toolbars to have quick access to various functions.

**To add a menu command to the toolbar**

1. Right-click on the toolbar and select Customize. The Customize window is displayed.
2. Select the Commands tab.
3. In the Commands list, select the desired menu command and drag it onto the toolbar.
To remove a menu command from the toolbar

1. On the right side of a toolbar, click Toolbar Options.
2. Select Add or Remove Buttons, then select the name of the toolbar containing the menu command.
3. Clear the option for the menu command.

Panels

The following panels are available in Document Review:

- **Batch Content Panel**
- **Document Viewer**
- **Current Problem Panel**

**Batch Content Panel**

The Batch Content panel is on the left side of the Document Review application and contains the navigation tree and the batch contents. The batch content cannot be hidden or moved within the Document Review window.

![Batch Content Panel](image)

**Figure 2.2. Batch Content Panel**

1. The name of the batch.
2. A problem document. By default, the first problem is displayed.
3. A document with its class name, page count and confidence of classification result, which is displayed only if defined by the solution integrator.

**Document Viewer**

By default, the first page of the currently selected document is displayed in the Document Viewer. To display a subsequent page in a multi-page document, click on its thumbnail in the Batch Content panel.

This panel can be floated to any position on the screen, inside or outside of the Document Review window.

In order to see a document or page more clearly, you can zoom in or out using Zoom In and Zoom Out on the toolbar or the mouse wheel. If you want to move around a zoomed document, hold Shift while you hold the left mouse button and drag.
Current Problem Panel

Document or global problems are displayed in the Current Problem panel. A problem may contain one or more Document Review rule failures, such as “1. Every document of class Header1 must have exactly a page.”.

You can navigate between problems by clicking Next Problem  and Previous Problem  on the toolbar.

Adjusting the Panel Layout

You can Auto Hide various panels so they collapse into a tab wherever they are docked. To auto hide either of these panels, click on the pin  in the panel header. Click on the pin  in a panel tab to return the panel to its original location.

Note A panel needs to be docked before it can be dragged outside of the window. This means that you cannot undock a panel that has Auto Hide turned on.

Status Bar

The status bar provides the state of the Insert (OVR), Num Lock (NUM) and Caps Lock (CAP) keys. The state of Document Review, the number of documents, the number of selected documents (for multiple-selection), pages in the currently selected document, and the number of problems are also displayed.

Windows

The following windows are available in Document Review:

- Open Batch
- Settings
- Application Language
- Rejection Note

Open Batch Window

The Open Batch window enables you to choose which batch to open. It is displayed when:

- Batches are ready for Document Review when the module is started, and the Open next batch automatically option is not selected.
- Batches are ready for Document Review when you close a batch, and the Open next batch automatically option is not selected.
- The window is opened from the main menu or toolbar.

The window provides a list of batches that are ready for Document Review, one of which can be selected for processing.

List of Batches

A list of available batches that are ready to be processed with Document Review is displayed. You can sort the list by column by clicking on the corresponding column’s label.
Name. The name of the batch.

BatchClass. The name of the batch class.

Date. The date and time when the batch was created.

Status. The current Kofax Capture batch status. For further details, see Kofax Capture Help.

Priority. The priority level for processing the batch from 1 to 10, with 1 as the highest priority. For further details, see Kofax Capture Help.

StationID. The station ID for the workstation where the batch was created. For further details see Kofax Capture Help.

Settings Window

The settings are used to define the application’s behavior.

The following tabs are available:

- Batch Settings
- Shortcuts

Batch Settings Tab

Use the Batch Settings tab to define behavior for the batch, for example after you have fixed all problems of the documents and the batch.

End of Batch Behavior

The following options are available for configuring the end of batch behavior:

Prompt before closing batch. When all documents in the batch have been processed, this message is displayed by default. To turn off this prompt, clear the option. The batch automatically closes without prompting.

Open next batch automatically. By default, this option is enabled so that when one batch closes, the next batch automatically opens. If Poll for next batch (seconds) is selected, the module checks for batches to be processed based on the specified polling interval. If there is a batch waiting, it opens immediately.

To show suspended batches, select the Include suspended batches option.

Script

By default, Activate script debugging is disabled. When selected, the Script Editor window can be displayed and scripts can be debugged in the Document Review. This option may be disabled by your solution integrator.

Shortcuts Tab

Use the Shortcuts tab to customize the shortcut keys and hot keys. You can change the current settings for a command by selecting a different shortcut key or hot key from the drop-down list box. Click the appropriate Shortcut Key or Hot Key cell and select the keys you want to use from the drop-down list box. A shortcut key comprises a combination of key presses, whereas a hot key comprises a single key press.

You can reset the default shortcut and hot key settings by clicking Reset. The default shortcut settings are loaded, which overwrite the current settings.

Note If you change the shortcut and hot key settings in Document Review these changed settings are used for any batch that is opened for this user.
Shortcut and Hot Key Table

The following columns are available for the table to define command shortcut keys and hot keys. This list is available for editing only if defined by your solution integrator.

- Menu - Lists the menu item from the main menu
- Command - Lists the command for which you can assign a shortcut key and hot key
- Shortcut Key - Key combinations that you can press have quick access to the selected command
- Hot Key - A key that you can press have quick access to the selected command

The following settings are predefined for shortcut keys and hot keys. Solution integrators can redefine these settings or make them unavailable, so your settings may be different than those listed in the table.

Table 2.7. Default Shortcut and Hot Key Settings

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Hot Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + L</td>
<td>None</td>
<td>Closes a batch</td>
</tr>
<tr>
<td>CTRL + O</td>
<td>None</td>
<td>Opens a batch</td>
</tr>
<tr>
<td>CTRL + S</td>
<td>None</td>
<td>Suspends a batch</td>
</tr>
<tr>
<td>CTRL + D</td>
<td>ENTER</td>
<td>Confirms a class for a document in a batch</td>
</tr>
<tr>
<td>CTRL + F</td>
<td>HOME</td>
<td>Navigates to the first document in a batch if a document is selected and navigates to the first page in a document if a page is selected</td>
</tr>
<tr>
<td>CTRL + SHIFT + F</td>
<td>END</td>
<td>Navigates to the last document in a batch if a document is selected and navigates to the last page in a document if a page is selected</td>
</tr>
<tr>
<td>CTRL + P</td>
<td>DOWN ARROW</td>
<td>Navigates to the next document in a batch</td>
</tr>
<tr>
<td>CTRL + SHIFT + P</td>
<td>UP ARROW</td>
<td>Navigates to the previous document in a batch</td>
</tr>
<tr>
<td>CTRL + N</td>
<td>ENTER</td>
<td>Navigates to the next problem in a batch</td>
</tr>
<tr>
<td>CTRL + SHIFT + N</td>
<td>BACKSPACE</td>
<td>Navigates to the previous problem in a batch</td>
</tr>
<tr>
<td>CTRL + H</td>
<td>None</td>
<td>Changes a class for a document in a batch</td>
</tr>
<tr>
<td>CTRL + J</td>
<td>None</td>
<td>Rejects a document in a batch</td>
</tr>
<tr>
<td>CTRL + SHIFT + J</td>
<td>None</td>
<td>Unrejects a document in a batch</td>
</tr>
<tr>
<td>CTRL + DELETE</td>
<td>None</td>
<td>Deletes a document in a batch</td>
</tr>
<tr>
<td>CTRL + M</td>
<td>None</td>
<td>Merges the selected document with the previous document</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>Merges the selected documents with the first document in the selection</td>
</tr>
<tr>
<td>CTRL + T</td>
<td>None</td>
<td>Splits the selected page from the document and creates a new document</td>
</tr>
<tr>
<td>CTRL + C</td>
<td>None</td>
<td>Copies the selected page or document to the clipboard</td>
</tr>
<tr>
<td>CTRL + V</td>
<td>SPACEBAR</td>
<td>Expands and collapses a document in a batch</td>
</tr>
</tbody>
</table>
## Shortcut Key | Hot Key | Description
---|---|---
None | PAGE UP ARROW | Presents the first document in a batch
None | PAGE DOWN ARROW | Presents the last document in a batch
CTRL + HOME | None | Moves the selected document to the beginning of a batch
CTRL + END | None | Moves the selected document to the end of a batch
CTRL + UP ARROW | None | Moves the selected document one position higher in a batch
CTRL + DOWN ARROW | None | Moves the selected document one position lower in a batch
CTRL + SHIFT + R | None | Rotates a page left
CTRL + R | None | Rotates a page right
None | DELETE | Deletes a selected page
None | RIGHT ARROW | Navigates to the next page (if a page is selected)
None | LEFT ARROW | Navigates to the previous page (if a page is selected)
CTRL + SHIFT + HOME | None | Moves the selected page to the beginning of a document
CTRL + SHIFT + END | None | Moves the selected page to the end of a document
CTRL + SHIFT + LEFT ARROW | None | Moves the selected page one position left in a document
CTRL + SHIFT + RIGHT ARROW | None | Moves the selected page one position right in a document
CTRL + W | None | Overrides a problem on a document or the batch
CTRL + SHIFT + W | None | Restores the problem status of a document or a batch
CTRL + PLUS SIGN | None | Zooms in on an image in the Document Viewer
CTRL + MINUS SIGN | None | Zooms out of an image in the Document Viewer
CTRL + B | None | Displays an image in an optimum size in the Document Viewer
None | None | Displays the color image for a color document

### Buttons
The following additional button is provided. Note that the button may not displayed due to settings defined by the solution integrator.

- Reset - Click this button to reload the default shortcut and hot key settings.
Application Language Window

When you open Document Review for the first time, the language used is determined by the operating system. Use this window to change the language of the Document Review module. You must restart the application for changes to take effect.

To change the language

1. From the Options menu, choose Select Language.
2. Select the desired language from the drop-down list box.

If the required language is not available in the drop-down list box, you can download it by clicking on the Install additional languages link.

Rejection Note Window

Use this window to add a comment that describes why you have rejected the current document. When the document is opened in Quality Control, this comment is displayed. The following options are available:

- **Predefined.** This is a list of predefined comments. Select a suitable comment from the list or add your own comment to the free-form field. Any added comments are available for subsequent rejections.

- **Custom.** If the list of predefined comments does not contain a suitable comment, you may enter a new comment in the custom box and click OK. This comment is automatically added to the list of predefined comments.
Chapter 3

How Do I Use Document Review?

The purpose of Document Review is to ensure that every document in a batch contains the correct pages and has the correct classification. Operators are presented with a list of problems that need to be fixed (or overridden) before a set of documents can be processed further.

Kofax Capture Workflow

A batch is processed through Kofax Capture and is classified, separated, and optionally extracted by the time it reaches Document Review. If there are any problems with the classification and separation, they can be solved in Document Review.

After a batch has passed through Document Review, it will be sent for further extraction for any document with an altered structure. The data extracted at this stage of the workflow is critical, so it is important that any problems are fixed in Document Review beforehand.

After extraction is complete, the batch is passed on to additional modules to further process the extracted information. Finally, each document along with its extracted information is released to a back-end system for storage or further processing.

Problems in Document Review

The solution integrator decides which Document Review rules will be applied when a Kofax Transformation solution is configured. If any of these rules are not met when a batch is run, they appear as problems to be fixed in Document Review.

A problem consists of one or more failed Document Review rules that appear on a document or at the global level in the batch. This means that a batch may have several problems, each with one or more rule failures.

For example, a project has been configured requiring that a batch contain at least 50 documents, ten of which are application forms. These requirements are configured using two separate rules: one rule to specify the minimum number of documents needed in the batch, and a second rule to specify that there need to be at least ten applications in the batch.

After the batch is processed, there are only nine application forms and 49 documents due to poor separation. When Document Review starts, there is a single problem at the batch level that lists both of the Document Review rule failures as specified above.

Processing Batches with Document Review

You can start Document Review manually like a standard Windows application or from the Kofax Capture Batch Manager module. If you use the Batch Manager module, Document Review opens the batch and automatically shuts down when the batch is closed or suspended.

Document Review can be configured to open the next batch automatically. In this case, after starting the module or closing the current batch, any waiting batch opens automatically.

Note If no batches are waiting a message “No waiting batches” is displayed instead.
To configure the option to open batches automatically

1. From the Options menu, select Settings.
2. Select Open next batch automatically.
3. If required, select Poll for next batch (seconds) and type a value in the box.
4. If required, select Include suspended batches.

If the Open next batch automatically option is cleared, different behavior occurs when starting the module or closing the current batch. The Open Batch window is displayed, allowing you to choose a waiting batch.

To open a batch, select a batch from the list and click OK. The batch opens and the first document that contains a problem is displayed.

**Important** If a batch contains folders, several batch editing options are not available in Document Review.

### Reviewing Documents

Document Review is a comprehensive interface that enables you to fix problems using the following features:

- **Batch Content panel** provides a clear structure of the batch, including thumbnail images of pages.
- A panel provides details of the **current problem**, particularly the Document Review rule that has not been met.
- A shortcut or hot key is available to move to, or automatically select the next problem in the batch (depending on the configuration).
- The first page of the selected document is displayed in the **Document Viewer**. You can display others by using simple navigation.

### Fixing Problems

A problem is displayed in Document Review if any of the following batch rules are not met:

- **This batch must have N documents.**
- **This batch must have N documents of class X.**

Document Review identifies problems if any of the following document level rules are not met:

- **Every document of this class must have N pages.**
- **Every document must have a class.**
- **Every document with a suggested class must be reviewed.**

**Important** If a batch contains folders, several batch editing options are not available in Document Review.

### Multi-Selecting Documents

You can select multiple documents to complete the following tasks in Document Review:
- Confirming a class
- Deleting documents
- Merging documents
- Rejecting documents
- Unrejecting documents

**Note** You cannot drag multi-selected documents or pages.

For multiple selected documents the top selected document is displayed in the Document Viewer. If you merge multiple selected documents they are merged with the top selected document in the tree view.

**To select several consecutive documents**

1. Press SHIFT and left-click the first document.
2. Hold SHIFT and left-click the document up to which you want to expand the selection.

**To select several non-consecutive documents**

1. Press CTRL and left-click the document.
2. Hold CTRL and left-click the next document.
3. Repeat the proceeding step until all documents are selected.

**This Batch Must Have N Documents**

This batch has an incorrect number of documents. You can resolve this problem by performing one of the following actions:

**Dragging Pages and Documents**

If a document contains a page that belongs to a previous or subsequent document, you can drag the page to the correct document. Similarly, if the pages within a document are in the incorrect order, you can drag the pages to reorder the document.

To move a page, drag it to the desired location.

If a batch contains a document that is located in the wrong position, you can drag it to the correct position. To move a document, drag it to the desired location.

If you drag a document over another document, it is inserted before that document. If you drag a document between two documents, it is inserted between them. If you drag a document on top of the batch, the document is inserted at the end of the batch.

You cannot drag multiple selected pages or documents.

**Merging Documents**

If a document has been incorrectly separated from another document, you can either merge it with the previous document or merge multiple several documents to create a complete document. If you merge multiple selected documents they are merged with the top selected document in the tree view. A message is displayed if you merge documents that have different classification results. If you confirm merging, the documents are merged with the top selected document and are assigned to the top document's class.

**To merge a document to previous**

1. Select the document you want to merge.
To merge multiple selected documents

1. Select several documents while holding CTRL (or SHIFT for consecutive documents).
2. From the Document menu, select Merge, or select Merge from the context menu.

The selected documents are merged with the first document in the selection.

Splitting Documents

If a document contains one or more pages that do not belong to it, you can separate these pages from the current document and create a new document with them.

Splitting separates the current document into two documents. The selected page becomes the first page of the new document, which is not classified and requires attention. If your project has a default classification, the new document is assigned this class. If the assigned class is incorrect, you can change it.

To split a document

1. Select the first extraneous page in the document you want to split.

The current document is separated into two documents.

You can split documents as many times as necessary to return the documents to their correct structure.

Copying Pages and Documents

You can copy a page or a document and paste it elsewhere within a batch. A copied page is pasted as the last page of the selected document. A copied document is pasted after the selected document.

**Important** Pasting pages or documents decreases the scan volume license. Each time a copied page is pasted, the scan license is reduced by one. If you paste the same page several times, the scan license is reduced each time you paste it. If you paste a document, the scan license is decreased by the number of document pages.

You can paste pages or documents as many times as needed to correct a batch. If you alter the copied page or document by performing any of the following actions, the copied data is no longer available, and an error message is displayed:

- Suspending and reopening the batch
- Deleting the page or the document
- Merging the document
- Splitting the document
- Rotating the page

**Note** The option to copy a page or document may be made unavailable by your solution integrator.

To copy a document

1. Select the document you want to copy.
2. Select Copy from the Document menu or Copy Document from the context menu.

The document is copied to the clipboard.
To copy a page

1. Select the page you want to copy.
2. Select Copy from the Page menu or Copy Page from the context menu.
   The page is copied to the clipboard.
3. Select the document in which you want to paste the copied page.
4. Select Paste from the Page menu or the context menu.
   The page is pasted as the last page in the selected document.

This Batch Must Have N Documents of Class X

This batch has an incorrect number of documents in a specific class.
You can resolve this problem by performing one of the following actions:

Changing a Class

If the class is incorrect, change it as follows:

To change the class

1. Click the assigned class to activate the drop-down list box.
2. Select the correct class from the drop-down list box.

Dragging Pages and Documents

If a document contains a page that belongs to a previous or subsequent document, you can drag the page to the correct document. Similarly, if the pages within a document are in the incorrect order, you can drag the pages to reorder the document.

To move a page, drag it to the desired location.

If a batch contains a document that is located in the wrong position, you can drag it to the correct position. To move a document, drag it to the desired location.

If you drag a document over another document, it is inserted before that document. If you drag a document between two documents, it is inserted between them. If you drag a document on top of the batch, the document is inserted at the end of the batch.

You cannot drag multiple selected pages or documents.

Merging Documents

If a document has been incorrectly separated from another document, you can either merge it with the previous document or merge multiple several documents to create a complete document. If you merge multiple selected documents they are merged with the top selected document in the tree view. A message is displayed if you merge documents that have different classification results. If you confirm merging, the documents are merged with the top selected document and are assigned to the top document's class.

To merge a document to previous

1. Select the document you want to merge.
2 From the Document menu, select Merge to Previous, or select Merge to Previous from the context menu.

► To merge multiple selected documents

1 Select several documents while holding CTRL (or SHIFT for consecutive documents).
2 From the Document menu, select Merge, or select Merge from the context menu.
   The selected documents are merged with the first document in the selection.

Splitting Documents
If a document contains one or more pages that do not belong to it, you can separate these pages from the current document and create a new document with them.

Splitting separates the current document into two documents. The selected page becomes the first page of the new document, which is not classified and requires attention. If your project has a default classification, the new document is assigned this class. If the assigned class is incorrect, you can change it.

► To split a document

1 Select the first extraneous page in the document you want to split.
2 From the Document menu, select Split before Current Page.
   The current document is separated into two documents.
   You can split documents as many times as necessary to return the documents to their correct structure.

Copying Pages and Documents
You can copy a page or a document and paste it elsewhere within a batch. A copied page is pasted as the last page of the selected document. A copied document is pasted after the selected document.

Important Pasting pages or documents decreases the scan volume license. Each time a copied page is pasted, the scan license is reduced by one. If you paste the same page several times, the scan license is reduced each time you paste it. If you paste a document, the scan license is decreased by the number of document pages.

You can paste pages or documents as many times as needed to correct a batch. If you alter the copied page or document by performing any of the following actions, the copied data is no longer available, and an error message is displayed:

- Suspending and reopening the batch
- Deleting the page or the document
- Merging the document
- Splitting the document
- Rotating the page

Note The option to copy a page or document may be made unavailable by your solution integrator.

► To copy a document

1 Select the document you want to copy.
2 Select Copy from the Document menu or Copy Document from the context menu.
   The document is copied to the clipboard.
To copy a page

1. Select the page you want to copy.
2. Select Copy from the Page menu or Copy Page from the context menu.
   The page is copied to the clipboard.
3. Select the document in which you want to paste the copied page.
4. Select Paste from the Page menu or the context menu.
   The page is pasted as the last page in the selected document.

Every Document of This Class Must Have N Pages
This document has an incorrect number of pages.
You can resolve this problem by performing one of the following actions:

Changing a Class
If the class is incorrect, change it as follows:

To change the class

1. Click the assigned class to activate the drop-down list box.
2. Select the correct class from the drop-down list box.

Dragging Pages and Documents
If a document contains a page that belongs to a previous or subsequent document, you can drag the page to the correct document. Similarly, if the pages within a document are in the incorrect order, you can drag the pages to reorder the document.

To move a page, drag it to the desired location.

If a batch contains a document that is located in the wrong position, you can drag it to the correct position. To move a document, drag it to the desired location.

If you drag a document over another document, it is inserted before that document. If you drag a document between two documents, it is inserted between them. If you drag a document on top of the batch, the document is inserted at the end of the batch.

You cannot drag multiple selected pages or documents.

Merging Documents
If a document has been incorrectly separated from another document, you can either merge it with the previous document or merge multiple several documents to create a complete document. If you merge multiple selected documents they are merged with the top selected document in the tree view. A message is displayed if you merge documents that have different classification results. If you confirm merging, the documents are merged with the top selected document and are assigned to the top document's class.

To merge a document to previous

1. Select the document you want to merge.
2 From the Document menu, select Merge to Previous, or select Merge to Previous from the context menu.

► To merge multiple selected documents

1 Select several documents while holding CTRL (or SHIFT for consecutive documents).
2 From the Document menu, select Merge, or select Merge from the context menu.
   The selected documents are merged with the first document in the selection.

Splitting Documents

If a document contains one or more pages that do not belong to it, you can separate these pages from the current document and create a new document with them.

Splitting separates the current document into two documents. The selected page becomes the first page of the new document, which is not classified and requires attention. If your project has a default classification, the new document is assigned this class. If the assigned class is incorrect, you can change it.

► To split a document

1 Select the first extraneous page in the document you want to split.
2 From the Document menu, select Split before Current Page.
   The current document is separated into two documents.
   You can split documents as many times as necessary to return the documents to their correct structure.

Copying Pages and Documents

You can copy a page or a document and paste it elsewhere within a batch. A copied page is pasted as the last page of the selected document. A copied document is pasted after the selected document.

Important Pasting pages or documents decreases the scan volume license. Each time a copied page is pasted, the scan license is reduced by one. If you paste the same page several times, the scan license is reduced each time you paste it. If you paste a document, the scan license is decreased by the number of document pages.

You can paste pages or documents as many times as needed to correct a batch. If you alter the copied page or document by performing any of the following actions, the copied data is no longer available, and an error message is displayed:

- Suspending and reopening the batch
- Deleting the page or the document
- Merging the document
- Splitting the document
- Rotating the page

Note The option to copy a page or document may be made unavailable by your solution integrator.

► To copy a document

1 Select the document you want to copy.
2 Select Copy from the Document menu or Copy Document from the context menu.
Chapter 3

The document is copied to the clipboard.

3. Select the document after which you want to paste the copied document.
4. Select Paste from the Document menu or the context menu.

The document is pasted after the selection.

► To copy a page

1. Select the page you want to copy.
2. Select Copy from the Page menu or Copy Page from the context menu.

The page is copied to the clipboard.

3. Select the document in which you want to paste the copied page.
4. Select Paste from the Page menu or the context menu.

The page is pasted as the last page in the selected document.

Every Document Must Have a Class

This rule is displayed in the Problem Display panel when a document does not have a class. You can resolve this problem with one of the following actions:

Assigning a Class

If there is no class, use the Class drop-down list box to assign a new class.

► To assign a class

1. Select the problem document to be updated.
2. Select the Class drop-down list box.
3. Begin typing the name of the class.
   The typed characters select the matching value from the drop-down list box of available classes.
4. Press ENTER to confirm the correct value.
   You can also assign the class by using the mouse to click on the current class, and then selecting a new class from the drop-down list box.

Every Document With a Suggested Class Must Be Reviewed

This message is displayed in the Current Problem panel when there is no class assigned to a document due to a result below the confidence threshold. When this happens, Document Review makes a suggestion based on the class alternatives that were below the confidence threshold. This can happen if a document was poorly scanned.

You can resolve this problem with one of the following actions:

Confirming the Class

If the class is correct, confirm the class for the document that is below the confidence threshold.

To confirm the class, right-click the class that needs to be confirmed and select Confirm Class. The focus stays on the currently selected document.

Note This navigation behavior can be changed by the solution integrator to display the next problem document.
Changing a Class
If the class is incorrect, change it as follows:

▶ To change the class

1. Click the assigned class to activate the drop-down list box.
2. Select the correct class from the drop-down list box.

Foldering and Fixing Problems

When foldering is enabled, the folder levels are not displayed in Document Review. As a result, there is a flat hierarchy structure, and documents are shown at the same level regardless of their folder structure.

The following Document Review actions are not available when a batch with folders is processed:

- Dragging Pages and Documents
- Moving Pages and Documents
- Merging Documents
- Splitting Documents
- Copying Pages and Documents

This prevents accidental restructuring of the folders. However, the following actions are available to correct any problems that are displayed in Document Review:

- Rejecting Documents
- Deleting Pages and Documents
- Changing a Class
- Confirming a Class
- Assigning a Class
- Overriding Problems

In addition, the following actions may help when solving a problem:

- Unrejecting Documents
- Restoring Problems
- Rotating Pages

Editing Batch Structure

The following actions enable you to edit the batch structure:

Dragging Pages and Documents

If a document contains a page that belongs to a previous or subsequent document, you can drag the page to the correct document. Similarly, if the pages within a document are in the incorrect order, you can drag the pages to reorder the document.

To move a page, drag it to the desired location.

If a batch contains a document that is located in the wrong position, you can drag it to the correct position. To move a document, drag it to the desired location.
If you drag a document over another document, it is inserted before that document. If you drag a
document between two documents, it is inserted between them. If you drag a document on top of the
batch, the document is inserted at the end of the batch.
You cannot drag multiple selected pages or documents.

**Moving Pages and Documents**

If a batch contains a page or document that is located in the wrong position in a batch, you can move it
to the correct position.

You can reorder documents in a batch by dragging them or by selecting commands in the Document
menu or context menu: Move to Top, Move Up, Move Down, or Move to Bottom. Move to Top moves
the document to the beginning of the batch. Move Up moves the document one position higher in the
batch. Move Down moves the document one position lower in the batch. Move to Bottom moves the
document to the end of the batch. Alternatively, you can use shortcut keys to move documents. You
cannot move multiple selected documents.

You can reorder pages in a document by dragging them or by selecting commands in the Page menu
or context menu: Move to Beginning, Move Left, Move Right, or Move to End. Move to Beginning
moves the page to the beginning of the document. Move Left moves the page one position left in the
document. Move Right moves the page one position right in the document. Move to End moves the
page to the end of the document.

**Important** You can move pages and documents only for batches that contain no folders.

**To move a document**

1. Select the document you want to move.
2. From the Document menu, select one of the following commands or use shortcut keys or
drag-and-drop functionality.
   - Move to Top
   - Move Up
   - Move Down
   - Move to Bottom
3. If necessary, repeat step 2 until the document is in the desired position.

**To move a page**

1. Select the page you want to move.
2. From the Page menu, select one of the following commands or use shortcut keys or drag-and-
drop functionality.
   - Move to Beginning
   - Move Left
   - Move Right
   - Move to End
3. If necessary, repeat step 2 until the page is in the desired position.

**Merging Documents**

If a document has been incorrectly separated from another document, you can either merge it with
the previous document or merge multiple several documents to create a complete document. If you
merge multiple selected documents they are merged with the top selected document in the tree view. A
message is displayed if you merge documents that have different classification results. If you confirm merging, the documents are merged with the top selected document and are assigned to the top document's class.

To merge a document to previous

1. Select the document you want to merge.
2. From the Document menu, select Merge to Previous, or select Merge to Previous from the context menu.

To merge multiple selected documents

1. Select several documents while holding CTRL (or SHIFT for consecutive documents).
2. From the Document menu, select Merge, or select Merge from the context menu.
   The selected documents are merged with the first document in the selection.

Splitting Documents

If a document contains one or more pages that do not belong to it, you can separate these pages from the current document and create a new document with them.

Splitting separates the current document into two documents. The selected page becomes the first page of the new document, which is not classified and requires attention. If your project has a default classification, the new document is assigned this class. If the assigned class is incorrect, you can change it.

To split a document

1. Select the first extraneous page in the document you want to split.
   The current document is separated into two documents.
   You can split documents as many times as necessary to return the documents to their correct structure.

Copying Pages and Documents

You can copy a page or a document and paste it elsewhere within a batch. A copied page is pasted as the last page of the selected document. A copied document is pasted after the selected document.

Important Pasting pages or documents decreases the scan volume license. Each time a copied page is pasted, the scan license is reduced by one. If you paste the same page several times, the scan license is reduced each time you paste it. If you paste a document, the scan license is decreased by the number of document pages.

You can paste pages or documents as many times as needed to correct a batch. If you alter the copied page or document by performing any of the following actions, the copied data is no longer available, and an error message is displayed:

- Suspending and reopening the batch
- Deleting the page or the document
- Merging the document
- Splitting the document
- Rotating the page
To copy a document

1. Select the document you want to copy.
2. Select Copy from the Document menu or Copy Document from the context menu. The document is copied to the clipboard.
3. Select the document after which you want to paste the copied document.
4. Select Paste from the Document menu or the context menu. The document is pasted after the selection.

To copy a page

1. Select the page you want to copy.
2. Select Copy from the Page menu or Copy Page from the context menu. The page is copied to the clipboard.
3. Select the document in which you want to paste the copied page.
4. Select Paste from the Page menu or the context menu. The page is pasted as the last page in the selected document.

Overriding Problems

If you cannot fix a problem, you can override it. This allows the batch to be closed, despite this document or batch failing one or more Document Review rules.

To override a problem

1. Select the document that has a problem, or the batch.
2. From the Problem menu, select Override Problem. The problem icon on the document is replaced with the Override Problem icon.

Restoring Problems

You can restore the problem status of a document or the batch.

To restore a problem

1. Select the document that has an overridden problem, or the batch.
2. From the Problem menu, select Restore Problem. If the document still has a problem, the problem icon on the document is restored.

Rejecting Documents

If you cannot fix a problem in a batch, you can reject a document. This sends the entire batch to Quality Control where it can be reviewed and fixed by a Quality Control operator. You can use multi-selection to reject or unreject documents.

To reject a document

1. Select the document you want to reject.
2. From the Document menu, select Reject.

3. Type the reason for rejecting the document in the window or select a reason from the predefined list.
   The document is marked with the rejection symbol.

Unrejecting Documents
If you have rejected a document by accident you can unreject it again. You can use multi-selection to unreject documents.

▶ To unreject a document

1. Select the document you want to unreject.

2. Select Unreject from the Document menu or the context menu.

3. The rejection symbol is deleted from the document.

Rotating Pages
If a document has a page with the wrong orientation, you can rotate the page.

▶ To rotate a page

1. Select the page that is incorrectly oriented.

2. Click Rotate Left 🔄 or Rotate Right 🔄 from the toolbar as appropriate.
   Click rotate as many times as needed to correct the page orientation.

Deleting Pages and Documents
If a batch contains extra or duplicated documents, you can delete them. Similarly, if a document has extra or duplicate pages, you can delete them. You can select multiple documents or pages to be deleted.

Note The option to delete a page or document may be disabled by your solution integrator.

Important If you delete a document or page, it is permanently removed from a batch. Only delete a document or page if there is no other way to fix the problem. Always consider rejecting the document instead.

▶ To delete a document

1. Select a document to delete.

2. From the Document menu, select Delete Document.

▶ To delete a page

1. Select a page to delete.

2. From the Page menu, select Delete Page.

Editing Classes
The following actions enable you to edit the class assigned to a document. This may be necessary if a document has no class or an incorrect class.
Assigning a Class
If there is no class, use the Class drop-down list box to assign a new class.

► To assign a class

1 Select the problem document to be updated.
2 Select the Class drop-down list box.
3 Begin typing the name of the class.
   The typed characters select the matching value from the drop-down list box of available classes.
4 Press ENTER to confirm the correct value.
   You can also assign the class by using the mouse to click on the current class, and then selecting a new class from the drop-down list box.

Changing a Class
If the class is incorrect, change it as follows:

► To change the class

1 Click the assigned class to activate the drop-down list box.
2 Select the correct class from the drop-down list box.

Confirming the Class
If the class is correct, confirm the class for the document that is below the confidence threshold.
To confirm the class, right-click the class that needs to be confirmed and select Confirm Class. The focus stays on the currently selected document.

Note This navigation behavior can be changed by the solution integrator to display the next problem document.

Keyboard Navigation
You can navigate around Document Review using the keyboard, allowing faster batch processing for all users.

You can use Shortcut Keys (a combination of keys) or the following single key presses.

Arrow Keys
The arrow keys can be used to move between pages and documents, collapsing and expanding them as you enter or exit a document. Navigating folders in Windows Explorer behaves in the same way.

Example. Results for Pressing Arrow Key
If you have the third page of a document selected, pressing the left arrow key several times will have the following effect:

1 Pressing it once moves focus to the second page of the document. The Document Viewer will update to display the second page of the document.
2 Pressing it a second time moves to the first page of the document. The Document Viewer will update to display the first page of the document.
3 Pressing it a third time collapses the selected document.
4 Pressing it a fourth time will select the batch. The Document Viewer will be empty as there are no pages assigned to a batch.

**Home and End Keys**

Pressing the Home key focuses on the first page in the current document. Pressing the Home key a second time navigates to the first page of the first document in the batch.

Pressing the End key focuses on the last page of the current document. Pressing the End key a second time navigates to the first page of the last document in the batch.

**Tab and Space Keys**

The Tab key switches focus between the Batch Content Panel and the Document Viewer. The Space bar expands and collapses the selected document.

**Shortcut Keys and Hot Keys**

Document Review provides the following shortcut keys and hot keys that make it easier to process batches.

**Customizing Toolbars**

You can customize the toolbars to have quick access to various functions.

▶ **To add a menu command to the toolbar**

1 Right-click on the toolbar and select Customize.
   The Customize window is displayed.
2 Select the Commands tab.
3 In the Commands list, select the desired menu command and drag it onto the toolbar.

▶ **To remove a menu command from the toolbar**

1 On the right side of a toolbar, click Toolbar Options.
2 Select Add or Remove Buttons, then select the name of the toolbar containing the menu command.
3 Clear the option for the menu command.

**Customizing Shortcuts**

You can customize the shortcut keys and hot keys to gives operators quick access to Document Review functionality.

▶ **To customize shortcut keys and hot keys**

1 In Document Review from the Options menu, select Settings.
   The Settings window is displayed.
2 Select the Shortcuts tab.
   A list of shortcuts is displayed.
3 Click the appropriate command cell for the shortcut key or hot key column, and select the key you want to use from the drop-down list box. The list may be unavailable due to settings that your solution integrator may have set.

**To reset shortcut and hot keys to default settings**

1 In Document Review from the Options menu select Settings.
   The Settings window is displayed.
2 Select the **Shortcuts tab**.
   A list of shortcuts is displayed.
3 Click Reset.
   The default shortcut key and hot key settings are loaded and override the current settings.

---

**Note** The Reset button may not be displayed due to settings defined by your solution integrator.
Correction has a menu and toolbar for quick access to various features and commands. The fields to be corrected are displayed below. In addition, a status bar is displayed along the bottom of the window and provides additional information to the user. Your solution integrator may have configured the module to hide the Previous Field, the Next Field, or both.

![Image of Correction Interface](image)

Figure 4.1. Kofax Transformation Modules - Correction Interface

1. Previous Field panel
2. Current Field panel
3. Next Field panel
Menu Bar

Correction provides a standard, Windows-style menu bar with the following menus:

- Batch
- Edit
- View
- Field
- Options
- Help

Note Your solution integrator may have customized or disabled some of the options listed below.

Batch Menu

The following options are available:

- Open - a list of available batches that can be opened is displayed.
- Close - closes the current batch.
- Suspend - suspends the current batch.
- Exit - closes the module.

Edit Menu

The following options are available:

- Cut - removes the selected character to be pasted elsewhere. (Available only in whole field correction mode.)
- Copy - duplicates the selected character to be pasted elsewhere. (Available only in whole field correction mode.)
- Paste - places the copied or cut character at the selected position. (Available only in whole field correction mode.)
- Delete - removes the selected character.

View Menu

The following options are available:

- View Full Image - enables you to view and zoom in on the full image.
- Zoom In - increases the magnification of the current page in the image viewer. (Available only from the Image Viewer.)
- Zoom Out - decreases the magnification of the current page in the image viewer. (Available only from the Image Viewer.)
- Best Fit - fits the image size to the viewer. (Available only from the Image Viewer.)
- Zoom to - select one of the available options to zoom to the top left, top right, bottom left or bottom right corner of the first, last or current page. (Available only from the Image Viewer.)
- Reset Window Positions - returns the main window, the Previous Field, an the Next Field to the default positions.

Field Menu

The following options are available:
Note This item is available only from the Correction Viewer

- Insert Last Value - copies the Previous Field value into the Current Field.
- Insert OCR Value - copies the value from the OCR value displayed above the field. Use this if you can see that the OCR data is correct for the whole field.
- First - navigates to the first field in the batch.
- Previous - navigates to the previous field.
- Next - navigates to the next field.
- Last - navigates to the last field in the batch.
- Next Incorrect Field - navigates to the next field requiring correction.
- Override Field - removes the “incorrect” status of the field if correction is not possible or would be time-consuming. If you select this option, the field can be corrected by the user of the Validation module.
- Correct Whole Field - puts the field into a mode in which the entire field can be edited.

Options Menu

The following options are available:

- Select Language - enables you to select one of the available languages for the application interface.
- Settings - shows the settings window that is used to make user-specific settings.

Help Menu

The following options are available:

- Contents - opens the Help for the Correction module.
- About - shows information about the Correction module.

Toolbars

The toolbars are found below the menu bar. They provide shortcuts to many menu items and provide quick access to important features.

Use the Batch toolbar to manage batches.

Table 4.1. The Batch Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Open Batch</td>
</tr>
<tr>
<td></td>
<td>Displays the list of available batches so you can select one to open.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Suspend Batch</td>
</tr>
<tr>
<td></td>
<td>Suspends the current batch.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Close Batch</td>
</tr>
<tr>
<td></td>
<td>Closes the current batch.</td>
</tr>
</tbody>
</table>

Use the View toolbar to adjust the size of the image displayed in the viewer.
Table 4.2. The View Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![View Full Image](image) | View Full Image  
Enables you to view and zoom in on the full image. |
| ![Zoom In](image) | Zoom In  
Increases the magnification of the current page. |
| ![Zoom Out](image) | Zoom Out  
Decreases the magnification of the current page. |
| ![Best Fit](image) | Best Fit  
Adjusts the size of the image displayed to best fit the window. |

Use the Field toolbar to move between fields and specify how field data is edited.

Table 4.3. The Field Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Copy Previous Field" /></td>
<td>Copies the Previous Field value into the Current Field.</td>
</tr>
<tr>
<td><img src="image" alt="Copy OCR" /></td>
<td>Copies the full field value from the OCR data displayed above the field.</td>
</tr>
<tr>
<td><img src="image" alt="First Field" /></td>
<td>Navigates to the first field in the batch.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Field" /></td>
<td>Navigates to the previous field in the batch.</td>
</tr>
<tr>
<td><img src="image" alt="Next Field" /></td>
<td>Navigates to the next field in the batch.</td>
</tr>
<tr>
<td><img src="image" alt="Last Field" /></td>
<td>Navigates to the last field in the batch.</td>
</tr>
<tr>
<td><img src="image" alt="Next Incorrect Field" /></td>
<td>Navigates to the next incorrect field in the batch.</td>
</tr>
<tr>
<td><img src="image" alt="Remove Incorrect Status" /></td>
<td>Removes the incorrect status of the field if correction is not possible or would be time consuming. If you select this option, the field can be corrected by a Validation operator who may have more information about the field and document.</td>
</tr>
<tr>
<td><img src="image" alt="Edit Field" /></td>
<td>Puts the field into a mode where the entire contents can be edited.</td>
</tr>
</tbody>
</table>

Customizing Toolbars

You can customize the toolbars to have quick access to various functions.

► To add a menu command to the toolbar

1. Right-click on the toolbar and select Customize.  
The Customize window is displayed.
2. Select the Commands tab.
3. In the Commands list, select the desired menu command and drag it onto the toolbar.

► To remove a menu command from the toolbar

1. On the right side of a toolbar, click Toolbar Options ▼.
2  Select Add or Remove Buttons, then select the name of the toolbar containing the menu command.

3  Clear the option for the menu command.

Panels

The following panels are available in the Correction module:

- Correction Viewer panel
- Image Viewer panel

Correction Viewer Panel

The main Correction Viewer is designed for maximum efficiency when processing batches. The mouse is not required, which increases processing speed. The Correction Viewer shows the current unconfident field which has been marked for Correction. The Previous and Next Field panels give more information on the context of the Current Field, although these panels may be disabled by your solution integrator.

Previous Field

When working with the Current Field, it is possible to see the data entered in the Previous Field. If the data was entered incorrectly, you can use a shortcut key to move back to the Previous Field.

![Previous Field: Credit Card Num](image)

1  Title bar (provides the Previous Field name and allows the panel to be minimized).

2  Data for the Previous Field.

Current Field

The Current Field area displays the image of the field, the OCR data, and the data you are entering. Unconfident characters are displayed using character-sized images highlighted in a configurable color.

![Current Field: Credit Card Num](image)

1  Title bar (provides the Current Field name).

2  Image of the Current Field.

3  Data for the Current Field.
**Next Field**

The Next Field is displayed while the Current Field is still being entered, enabling you to see one step ahead.

![Image of Next Field]

Title bar (provides the Next Field name and allows the panel to be minimized).

Image of the Next Field.

Data for the Next Field.

---

**Image Viewer Panel**

The Image Viewer is used to locate and key the field data if it is not displayed fully in the Correction Viewer.

Within the Image Viewer, the field zone position shows where the data in the current field was extracted from. If the zone is not aligned with the data, you can see what the characters should be and enter them accordingly.

**Note** The zone position is set by the solution integrator and cannot be moved within Correction.

![Image of Image Viewer]

Data for the Current Field.

Current Field zone position.

OCR value.
Adjusting the Panel Layout

You can Auto Hide various panels so they collapse into a tab wherever they are docked. To auto hide either of these panels, click on the pin in the panel header. Click on the pin in a panel tab to return the panel to its original location.

**Note** A panel needs to be docked before it can be dragged outside of the window. This means that you cannot undock a panel that has Auto Hide turned on.

Status Bar

The status bar provides status messages, navigation information, the number of incorrect fields, and the state of the Insert (OVR), Num Lock (NUM) and Caps Lock (CAP) keys.

Windows

The following windows are available in Correction:

- Application Language
- Open Batch
- Settings

**Application Language Window**

Use this window to change the language of the Correction module user interface. You must restart the application for changes to take effect.

**Selecting the Desired Application Language**

Select the desired language from the drop-down list box. When you start Correction for the first time, the language used is determined by the operating system.

**Buttons**

The following buttons are available on the window:

- **OK** Saves your settings
- **Cancel** Closes the window and discards any changes made
- **Help** Displays the Help for this window

**Open Batch Window**

The Open Batch window is displayed when:

- Batches are ready for Correction when the module is started, and the Open next batch automatically option is not selected.
- Batches are ready for Correction when you close a batch, and the Open next batch automatically option is not selected.
- The window is opened from the main menu or toolbar

It provides a list of batches that are ready for Correction, one of which can be selected for processing.

**List of Batches**

A list of available batches that are ready to be processed with Correction is displayed. To sort the list by column, click on the corresponding column's label.
**Name.** The name of the batch.

**BatchClass.** The batch class name for the batch.

**Date.** The date and time when the batch was created.

**Status.** The current Kofax Capture batch status. For further details, see *Kofax Capture Help*.

**Priority.** The priority level for processing the batch from 1 to 10, with 1 as the highest priority. For further details, see *Kofax Capture Help*.

**StationID.** The station ID for the workstation where the batch was created. For further details, see *Kofax Capture Help*.

**ExternalBatchID.** The Kofax Capture batch ID that is used to reference the batch outside the database.

**Buttons**

The following buttons are available on the Open Batch window.

- **OK.** Saves your settings.
- **Cancel.** Closes the window and discards any changes made.
- **Refresh.** Updates the list of batches that are waiting for Correction.
- **Help.** Accesses Help for this window.

**Settings Window**

Settings are used to define the application’s behavior.

The following tabs are available:

- **Batch Settings**
- **Colors**

**Batch Settings Tab**

Use the Batch Settings tab to define the behavior for the batch after you have corrected the last field on the last document of a batch.

**End of Batch Behavior**

The following options are available for configuring the end of batch behavior:

- **Prompt before closing batch.** When all documents in the batch have been processed, this message is displayed by default. To turn off this prompt, clear the option. The batch automatically closes without prompting.
- **Open next batch automatically.** By default, this option is enabled so that when one batch closes, the next batch automatically opens. If Poll for next batch (seconds) is selected, the module checks for batches to be processed based on the specified polling interval. If there is a batch waiting, it opens immediately.
  
  To show suspended batches, select the Include suspended batches option.

**Colors Tab**

Use this tab to adjust the color settings for individual unconfident characters, invalid field text, and overridden fields.
**Color for Unconfident Characters**

The following options are available for individual unconfident characters:

- **Background Color.** The selected color from the drop-down list box highlights unconfident characters on the image and in the Correction Viewer in single character correction mode.

- **Border Color.** The selected color from the drop-down list box is used for the border around unconfident characters.

- **Border Thickness.** The thickness specified using the slider determines the thickness of the border which surrounds unconfident characters.

**Colors for Invalid Fields**

The following option is available for invalid fields:

- **Text Color.** The selected color from the drop-down list box is used for the error text displayed when a field fails a validation rule.

**Colors for Overridden Fields**

The following option is available for overridden fields:

- **Background Color.** The selected color from the drop-down list box highlights fields that have been overridden.
Chapter 5

How Do I Use Correction?

The goal of the Correction user is to take data extracted in the Server module and correct data that was rejected at the character level. The optimized interface allows fast correction of single characters using a single keystroke and also allows whole fields to be edited. Correction works on one batch at a time and allows the processing of fields in two modes: grouped by field name across the entire batch or grouped by individual document.

Important Some of the features documented in this section may not be applicable in your solution. Please check with your solution integrator for any areas of functionality that are not relevant to you.

Kofax Capture Workflow

A batch is processed through Kofax Capture, and all the data is extracted by the time it reaches Correction. If any characters are unconfident, the fields can be corrected and the new data validated. After leaving Correction, the batch, along with the corrected data, is passed on to additional modules to further process the extracted information. Finally, each document along with its extracted information is released to a back office system for storage or further processing.

Minimum Display Requirements

The minimum display requirements for the Correction module are:

- 1024 × 768 with 16-bit color resolution
- 17" monitor

Recommended Display Requirements

The recommended display requirements for the Correction module are:

- 1280 × 1024 with 24-bit color resolution
- 19 inch monitor

Processing Batches with Correction

Correction can be started manually like any standard Windows application or from Kofax Capture Batch Manager. If started from Batch Manager, Correction opens the batch and then automatically shuts down when the batch is closed or suspended. Correction can be set to “Open next batch automatically.” In this case, after starting the module or closing the current batch, the next waiting batch is opened automatically.

Note If no batches are waiting a message “No waiting batches” is displayed instead.

To configure the option to open batches automatically

1. From the Options menu, select Settings.
2. Select Open next batch automatically.
3. If required, select Poll for next batch (seconds) and type a value in the box.
4. If required, select Include suspended batches.

If the Open next batch automatically option is cleared, different behavior occurs when starting the module or closing the current batch. The Open Batch window is displayed, allowing you to choose a waiting batch.

To open a batch, select a batch from the list and click OK. The batch opens and the first document that contains a problem is displayed.

![Figure 5.1. Kofax Transformation Modules - Correction Module Showing First Incorrect Field](image)

**Single Character Correction**

If Server is uncertain about whether it has recognized a character correctly, a single character correction is required. All unconfident characters for the field are displayed as yellow character-sized images in the data entry area of the Current Field panel.

The current character is surrounded by a red border, and its position in the field is shown in the image area. In the case of large fields, the image zooms to the part of the field containing the unconfident character.

**Note** You can customize the unconfident character colors on the Colors tab of the Settings window.
You can make a single character correction by pressing the correct character key while the current character is highlighted. For example, for the field above you would press “5”. The next unconfident character is automatically loaded (there is no need to press ).

You can delete an unnecessary character by pressing Delete.

You can delete the previous character by pressing Backspace.

Note If correction of the field is not possible or would be time-consuming, override the field by pressing CTRL + ENTER. The field can be reviewed in the Validation module.

Whole Field Correction

If there are multiple single character corrections within a field, it may be more efficient to re-key the whole field than to enter multiple characters individually. If you want to key the entire field, you can move from single character correction mode to a whole field correction mode by pressing F12.

In this mode, the whole field is editable in the data entry area of the Current Field panel.

To make a whole field correction

1. Re-enter the data for the whole field or use the arrow, Delete, and Insert keys to modify part of the field.
2. Press ENTER.

A field is put into whole field correction mode automatically when:

- Fields with this name are configured to always display in whole field correction mode.
- The number of uncertain characters exceeds a pre-configured threshold.
- The field fails a validation rule.

Note If correction of the field is not possible or would be time-consuming, override the field by pressing CTRL + ENTER. The field can be reviewed in the Validation module.

Overriding Fields

If correction of a field is not possible or would be time-consuming, the field may be overridden in Correction and can be corrected by the user of the Validation module. In Validation the entire document is displayed, and this additional information may enable the data to be entered.

You can override a field in Correction by pressing CTRL + ENTER.

After a field has been overridden, the field is given a yellow background and marked with the overridden field icon. The next field is then loaded.

Note You can customize the colors for overridden fields on the Colors tab of the Settings window.

Inserting the Previous Field Value

You can insert the value displayed in the Previous Field panel if you can see that the Current Field should have the same value. You can insert the previous field value by pressing F4.
Inserting the OCR Value

The OCR data is displayed above the field in a small label. Before you make any single character corrections, you can choose to insert this data if you can see that the whole field was correctly extracted. This effectively performs several single character corrections at once. You can insert the OCR value for a field by pressing F8.

**Note** This option must be used before the first character in a field is corrected.

![Figure 5.3. OCR Value](image)

**OCR value.**

**Data for Current Field.**

Validation Rule Failures

The data in a field is validated when you navigate away from the field. If the field passes the validation rule, the next field is automatically loaded. If the validation rule fails, the field is put into whole field correction mode, and a red error description is displayed. The data must be re-keyed until it passes the validation rule.

**Note** You can customize the invalid field colors on the Colors tab of the Settings window.

If correction of the field is not possible or would be time-consuming, override the field by pressing CTRL + ENTER. The field can be reviewed in the Validation module.

Viewing the Full Image

The Image Viewer is used to locate and key the current field data if it is not displayed fully in the normal Correction Viewer. This may happen if the data is out of alignment with the extraction zone used by the recognition engine.

![Image Viewer](image)
Chapter 5

Figure 5.4. Keying a Field in the Image Viewer

To key a field in the Image Viewer

1. Open the Image Viewer by pressing F9.
2. Locate the data on the image using the Zoom In and Zoom Out icons ( Zoom In and Zoom Out ) on the toolbar, and the horizontal and vertical scroll bars.
3. Enter the data for the field.
   The data you enter is displayed in the box at the top of the window.
4. Press F9 to return to the Correction Viewer.
5. Press ENTER to save the data.

Important Correcting fields in this way is not recommended as it can be time-consuming. If possible, override the field by pressing CTRL + ENTER so it can be reviewed in the Validation module.

Navigating Within a Batch

Navigation within Correction is handled automatically as it displays only those fields which require correction and moves to the next field once a field has been corrected. However, it is possible to manually navigate forward and backward through all the fields.
You can:

- Navigate to the next field by pressing PAGE DOWN
- Navigate to the previous field by pressing PAGE UP
- Navigate to the next field requiring correction by pressing CTRL + N

Closing a Batch

When the last field in a batch has been corrected, a window is displayed. From this window, you can either close the batch or stay in the current batch to review your corrections.

Note You can disable this window on the Batch Settings tab of the Settings window.

Field Order

Depending on the options specified by the solution integrator, the fields in the batch are ordered in one of the following ways:

- Grouped by field name (for example, all “Invoice Date” fields, followed by all “Invoice Number” fields, and so on) across the entire batch.
  All unconfident fields for the first field name are displayed, across multiple documents, followed by unconfident fields for the second field name, and so on.
- Grouped by individual document.
  All unconfident fields for the first document in the batch are displayed, in field order, followed by unconfident fields for the second document, and so on.

Shortcut Keys

The following table lists the shortcut keys that can be used in Correction.
Table 5.1. Shortcut Keys for Correction

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + O</td>
<td>Opens a batch.</td>
</tr>
<tr>
<td>CTRL + L</td>
<td>Closes a batch.</td>
</tr>
<tr>
<td>CTRL + S</td>
<td>Suspends a batch.</td>
</tr>
<tr>
<td>PAGE DOWN (or TAB)</td>
<td>Navigates to the next field. The next field is selected according to the field order.</td>
</tr>
<tr>
<td>PAGE UP (or SHIFT + TAB)</td>
<td>Navigates to the previous field.</td>
</tr>
<tr>
<td>CTRL + PAGE UP</td>
<td>Navigates to the first field.</td>
</tr>
<tr>
<td>CTRL + PAGE DOWN</td>
<td>Navigates to the last field.</td>
</tr>
<tr>
<td>DELETE</td>
<td>Removes an uncertain character in single character correction mode.</td>
</tr>
<tr>
<td>BACKSPACE</td>
<td>Removes the previous character whether unconfident or not in single character correction mode.</td>
</tr>
<tr>
<td>F12</td>
<td>Switches from single character correction mode to whole field correction mode.</td>
</tr>
<tr>
<td>F9</td>
<td>Views the current image in full (if enabled).</td>
</tr>
<tr>
<td>F8</td>
<td>Inserts the OCR value for the whole field (if enabled).</td>
</tr>
<tr>
<td>F4</td>
<td>Inserts the Previous Field value into the Current Field (if enabled).</td>
</tr>
<tr>
<td>CTRL + ENTER</td>
<td>Overrides a field.</td>
</tr>
<tr>
<td>CTRL + N</td>
<td>Navigates to the next field requiring correction.</td>
</tr>
</tbody>
</table>

Customizing Shortcut Keys

You can customize the shortcut keys.

To customize a shortcut key

1. Right-click on the toolbar and select Customize. The Customize window is displayed.
2. Click Keyboard. The Customize Keyboard window is displayed.
3. In the Commands list, select a menu command whose shortcut key you want to customize.
4. In the Specify a Shortcut list, select the new shortcut key.
Quick Tour of Validation

Validation has a main menu and a toolbar for quick access to various features and commands. Beneath these, the interface is usually divided into four main areas. On the left a navigation tree contains the contents of the batch. In the center, there is a field editing panel which displays the validation form, and below this form is a context-sensitive editor panel. On the right, a document viewer displays the current page.

If the Document Viewer and/or InPlace Editor are visible, they can be undocked and repositioned. The Current Error area is then part of the InPlace Editor. If the InPlace Editor is not displayed on the validation form, the Current Error area is displayed at the bottom of the form.

A status bar is also displayed at the bottom of the window, providing additional information.

The following figure shows the default user interface for Validation with a batch opened. The layout of the user interface can be customized by your solution integrator using Project Builder.

![Figure 6.1. Kofax Transformation Modules - Validation Interface](image)

**Figure 6.1. Kofax Transformation Modules - Validation Interface**

1. Batch Content panel
Menu Bar

Validation provides a standard, Windows-style menu bar with the following menus:

- **Batch**
- **Edit**
- **View**
- **Folder**
- **Document**
- **Page**
- **Field**
- **Options**
- **Help**

**Batch Menu**

The following options are available:

- Open – displays the list of all available batches so you can select one to open.
- Close – closes the current batch.
- Suspend – suspends the current batch.
- Edit Batch – switches to Edit Batch mode.
- Execute Auto Foldering – performs the script code that has implemented in the **PerformAutofoldering** event handler. It can be used, for example to create folders and put all documents with the same vendor ID into one folder.
- Exit – closes the Validation module.

**Edit Menu**

The following options are available:

- Undo – reverts the last action in the validation form (not available in Edit Batch mode).
- Redo – repeats the last action in the validation form (not available in Edit Batch mode).
- Cut – deletes the selected folder, document, or page (available only in Edit Batch mode).
- Copy – duplicates the selected item (available only in Edit Batch mode).
- Paste – places the copied or cut folder, document or page at the selected position (available only in Edit Batch mode).
- Delete – removes the currently-selected item (available only in Edit Batch mode).
- Add Page – creates a page in the current document (available only in Edit Batch mode). A file open window is displayed to let you select a page.
- Add Document – adds a new document and places all selected pages in it (available only in Edit Batch mode). A file open window is displayed to let you select page(s) for the document.
Create Folder – adds a new folder and moves the currently-selected document to the new folder (available only in Edit Batch mode).

Merge – combines all selected documents (available only in Edit Batch mode).

Split – separates the current item. This item is not available on the first document/page or if only one page/document is in that document or folder (available only in Edit Batch mode).

Reject – adds a flag to the currently-selected document or page so it is sent to Quality Control. Reject is only enabled in the menu when you have selected a document/page in the Batch Content panel that is not already rejected.

Unreject – removes the rejection flag on the currently-selected document/page. Unreject is only enabled in the menu if you have selected a document/page in the Batch Content panel that is already rejected.

Kofax Capture Fields – opens the Kofax Capture Fields window that displays based on the selection the Kofax Capture batch fields, folder index fields, or document index fields.

View Menu

The following options are available:

- Zoom In – increases the magnification of the current page in the image viewer.
- Zoom Out – decreases the magnification of the current page in the image viewer.
- Best Fit – fits the image size to the viewer.
- Zoom to – select one of the available options to zoom to the top left, top right, bottom left or bottom right corner of the first, last or current page. This option is disabled in Batch Edit mode.
- Automatic Focus – turns the mode on or off to automatically focus the highlighted field result on the page or document.
- Display Color Image – switches between the color and binary image of the document, if available.
- Batch Content – displays/hides the Batch Content panel on the left side of the window.
- Show Classification Result – displays/hides the class list for the Classification Result panel. If the list is displayed you can select a class from the list to change the current classification result for the document. The document is assigned to the new class and displayed in the validation form for that class. The fields on the validation form are empty as in Validation or Test Validation extraction is not redone (not available in Edit Batch mode).
- Viewer – the following options are available (disabled in Edit Batch mode):
  - Float Viewer – select to float the panel as a separate window and move it on the screen
  - Dock – select Left, Right, Top or Bottom to dock the window at top or bottom, or sides of the Validation window
- InPlace Editor – the following options are available (disabled in Edit Batch mode):
  - Float InPlace Editor – select to float the panel as a separate window and move it on the screen
  - Dock – select Bottom or Top to dock the window at top or bottom of the Validation window
- Reset Window Positions – this option resets docked windows to the default settings (not available in Edit Batch mode).

Folder Menu

The following options are available:
Quick Tour of Validation

- First – navigates to the first folder in the batch.
- Previous – navigates to the previous folder in the batch.
- Next – navigates to the next folder in the batch.
- Last – navigates to the last folder in the batch.

**Document Menu**

The following options are available:

- Make Available for Generic Online Learning – a window is displayed to mark the currently-selected document for Generic Online Learning. This function can be used to send the document back for optimization of classification or extraction. This is a configuration option, and may have been disabled by your solution integrator.
- Make Available for Specific Online Learning – marks the currently-selected document for Specific Online Learning. This function can be used to improve the recognition rate for the extraction of invoice fields. This is a configuration option, and may have been disabled by your solution integrator.
- First – navigates to the first document in the batch.
- Previous – navigates to the previous document in the batch.
- Next – navigates to the next document in the batch.
- Last – navigates to the last document in the batch.
- Go To – navigates to the given document number in the batch.

**Page Menu**

The following options are available:

- Create Document – adds a new document and places all selected pages in it (available only in Edit Batch mode).
- Rotate Left – rotates the page 90° to the left.
- Rotate Right – rotates the page 90° to the right.
- Properties – shows the properties of the currently-selected page.
- First – navigates to the first page in the document.
- Previous – navigates to the previous page in the document.
- Next – navigates to the next page in the document.
- Last – navigates to the last page in the document.

**Field Menu**

The following options are available:

---

**Note** This item is disabled in Edit Batch mode.

- Insert Last Value – inserts the value from a field in the previous document into the same field in the current document.
- Previous – selects the previous field in the tab sequence.
- Next – selects the next field in the tab sequence.
- Next Invalid Field – selects the next invalid field in the tab sequence.
- Clear Current Field – removes the content of the current field.
- Clear All Fields – removes the content of all fields in the validation form.

**Options Menu**

The following options are available:

- Show Script – opens the Script Code window to debug the script. For debugging (for example, to set a breakpoint and then check the value of a variable), the option Activate script debugging must be enabled on the Miscellaneous tab of the Settings window. Script debugging for the Validation module may be made unavailable by your solution integrator.
- Select Language – enables you to select one of the available languages for the application interface.
- Settings – the Settings window is displayed that is used to make user specific settings.

**Help Menu**

The following options are available:

- Contents – the Help for the Validation module is displayed.
- About – shows information about the Validation module.

**Context Menus**

The contents of the batch, folder, document and page context menus depend on the working mode, either Validation mode or Batch Edit mode, and the item selected.

**Note** When using Validation mode, only a single batch, folder, document or page can be selected. When using the Edit Batch mode, multiple selection is supported.

**Batch Context Menu - Validation Mode**

The following options are available:

- Open – displays a list of batches that can be opened. This is disabled if Validation is started from the Kofax Capture Batch Manager module.
- Close – closes the current batch.
- Suspend – suspends the current batch.
- Edit Batch – toggles the Edit Batch mode on and off. This is a configuration option, which may have been disabled by your solution integrator.
- Kofax Capture Fields – the Kofax Capture Fields window is displayed, which displays the Kofax Capture index fields.

**Batch Context Menu - Edit Batch Mode**

The following options are available:

- Paste – places the previously copied or cut document in the selected position.
- Create Folder – adds a new empty folder at the end of the folder list in the batch. If a document is selected at the batch level, the selected document is also moved to the newly-created folder.
Quick Tour of Validation

- Add Document – a window is displayed where you can select page(s) and place them in a document. For this new document, the Display Color Image mode is not available.
- Edit Batch – toggles the Edit Batch mode on and off.
- Execute Auto Foldering – automatically creates folders. All documents with the same content in specific fields are put into the same folder.
- Open – a list of batches is displayed that you can open. This is disabled if Validation is started from the Kofax Capture Batch Manager module.
- Close – closes the current batch.
- Suspend – suspends the current batch.

Folder Context Menu - Validation Mode

The following options are available:

- First – navigates to the first folder in the batch.
- Previous – navigates to the previous folder in the batch.
- Next – navigates to the next folder in the batch.
- Last – navigates to the last folder in the batch.
- Kofax Capture Fields – the Kofax Capture Fields window is displayed that displays the Kofax Capture folder index fields.

Folder Context Menu - Edit Batch Mode

The following options are available:

- Cut – deletes the selected folder.
- Copy – not available for folders.
- Paste – places the cut subfolder or copied document at the selected position.
- Delete – removes the currently-selected folder.
- Create Folder – adds a new folder. You can define subfolders only at levels defined by your solution integrator.
- Add Document – a window is displayed that enables you to select page(s) and place them in a document. For this new document, the Display Color Image mode is not available.
- Split – is available only when you have several subfolders in a folder. This function splits the parent folder above the currently-selected subfolder.
- Merge – combines all selected folders.
- First – navigates to the first folder in the batch.
- Previous – navigates to the previous folder in the batch.
- Next – navigates to the next folder in the batch.
- Last – navigates to the last folder in the batch.

Document Context Menu- Validation Mode

The following options are available:

- Reject – flags the currently-selected document so that it is sent to Quality Control. The Rejection Note window is displayed.
- Unreject – removes the rejection flag from the currently-selected document. Unreject is only enabled in the menu if you have selected a document that is already rejected.

- Make Available for Generic Online Learning – a window is displayed to mark the currently-selected document for Generic Online Learning. This function can be used to send the document back for optimization of classification or extraction. This is a configuration option and may have been disabled by your solution integrator.

- Make Available for Specific Online Learning – marks the currently-selected document for Specific Online Learning. This function can be used to improve the recognition rate for extraction of invoice fields. This is a configuration option and may have been disabled by your solution integrator.

- First – navigates to the first document in the batch.
- Previous – navigates to the previous document in the batch.
- Next – navigates to the next document in the batch.
- Last – navigates to the last document in the batch.
- Go To – navigates to the specified document number in the batch.

- Kofax Capture Fields – the Kofax Capture Fields window is displayed that displays the Kofax Capture document index fields.

**Document Context Menu - Edit Batch Mode**

The following options are available:

- Reject – flags the currently-selected document so that it is sent to Quality Control. The Rejection Note window is displayed.
- Unreject – removes the rejection flag from the currently-selected document. Unreject is only enabled in the menu if you have selected a document that is already rejected.
- Cut – deletes the selected document.
- Copy – duplicates the document and adds it to the list after the original document. For this copied document, the Display Color Image mode is not available.
- Paste – places the copied or cut document in the selected position.
- Delete – removes the currently-selected document.
- Create Folder – adds a new folder and moves the selected document to the new folder. It is only possible to create subfolders at a level defined by your solution integrator.
- Split – splits the current document above the currently-selected page. This command is not available on the first page or on single-page documents.
- Merge – combines all selected documents (available only if multiple documents are selected).
- Add Page – a window is displayed where you can select a page to add to the current document. For this new page, the Display Color Image mode is not available.
- Add Document Before – creates a new document. A window is displayed where you can select files to add to the new document. The new document is placed before the selected document. For this new document, the Display Color Image mode is not available.

- Make Available for Generic Online Learning – marks the currently-selected document for Generic Online Learning and sends the document back for optimization in classification or extraction. This is a configuration option and may have been disabled by your solution integrator.

- Make Available for Specific Online Learning – marks the currently-selected document for Specific Online Learning. This is a configuration option and may have been disabled by your solution integrator.
Quick Tour of Validation

- First – navigates to the first document in the batch.
- Previous – navigates to the previous document in the batch.
- Next – navigates to the next document in the batch.
- Last – navigates to the last document in the batch.
- Go To – navigates to the given document number in the batch.

**Page Context Menu – Validation Mode**

The following options are available:

- Reject – flags the currently-selected document so that it is sent to Quality Control. The Rejection Note window is displayed.
- Unreject – unrejects the currently-selected page. Unreject is only enabled in the menu if you have selected a document that is already rejected.
- Rotate Left – rotates the page 90° to the left.
- Rotate Right – rotates the page 90° to the right.
- Properties – shows the properties of the currently-selected page.
- First – navigates to the first page in the document.
- Previous – navigates to the previous page in the document.
- Next – navigates to the next page in the document.
- Last – navigates to the last page in the document.

**Page Context Menu – Edit Batch Mode**

The following options are available:

- Reject – rejects the currently-selected page. The Rejection Note window is displayed.
- Unreject – removes the rejection flag from the currently-selected document. Unreject is only enabled in the menu if you have selected a document that is already rejected.
- Cut – deletes the selected page.
- Copy – not available for pages.
- Paste – places the cut page in the selected position.
- Delete – removes the currently-selected page. The document and parent folders become invalid.
- Add Page Before – a window is displayed where you can select and add a page to the current document. For this new page, Display Color Image mode is not available.
- Create Document – adds a new document and places all selected pages in it.
- Split – splits the current document before the currently-selected page. This command is not available on the first page.
- Rotate Left – rotates the page 90° to the left.
- Rotate Right – rotates the page 90° to the right.
- Properties – shows the properties of the currently-selected page (file location).
- First – navigates to the first page in the document.
- Previous – navigates to the previous page in the document.
- Next – navigates to the next page in the document.
- Last – navigates to the last page in the document.
Toolbars

The toolbars provide shortcuts to many menu items and give you quick access to all important features. Use the Batch toolbar to manage batches and to toggle the Edit Batch mode on and off.

**Table 6.1. The Batch Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Open Batch](image) | Open Batch  
Displays the list of available batches so you can select one to open. |
| ![Suspend Batch](image) | Suspend Batch  
Suspends the current batch. |
| ![Close Batch](image) | Close Batch  
Closes the current batch. |
| ![Edit Batch](image) | Edit Batch  
Switches to the Edit Batch mode. |

Use the Folder toolbar to navigate the folders in the current batch.

**Table 6.2. The Folder Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![First](image) | First  
Navigates to the first folder in the batch. |
| ![Previous](image) | Previous  
Navigates to the previous folder in the batch. |
| ![Next](image) | Next  
Navigates to the next folder in the batch. |
| ![Last](image) | Last  
Navigates to the last folder in the batch. |

Use the Document toolbar to navigate among the documents in the current folder or batch. Additionally there is an option to make the current document available for Online Learning. This is a configuration option and may have been disabled by your solution integrator.

**Table 6.3. The Document Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![First Document](image) | First Document  
Navigates to the first document in the folder or batch. |
| ![Previous Document](image) | Previous Document  
Navigates to the previous document in the folder or batch. |
| ![Next Document](image) | Next Document  
Navigates to the next document in the folder or batch. |
Icons | Description
---|---
| Last Document  
Navigates to the last document in the folder or batch.
| Make Current Document Available for Generic Online Learning (state button)  
Opens a dialog box to mark the currently selected document for Generic Online Learning. This function can be used to send the document back for optimization of Classification or Extraction. This is a configuration option, and may have been disabled by the solution integrator.
| Make Current Document Available for Specific Online Learning (state button)  
Marks the currently selected document for Specific Online Learning. This function can be used to improve the recognition rate for extraction of invoice fields. This is a configuration option, and may have been disabled by the solution integrator.

Use the Page toolbar to navigate or rotate the pages in the current document.

**Table 6.4. The Page Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| First  
Navigates to the first page in the current document. |
| Previous  
Navigates to the previous page in the current document. |
| Next  
Navigates to the next page in the current document. |
| Last  
Navigates to the last page in the current document. |
| Rotate Left  
Rotates the page 90° to the left.  
Any existing field data is lost if a page is rotated. |
| Rotate Right  
Rotates the page 90° to the right.  
Any existing field data is lost if a page is rotated. |

Use the View toolbar to adjust the size of the image displayed in the viewer.

**Table 6.5. The View Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| Zoom In  
Increases the magnification of the current page. |
Use the Edit toolbar to redo or undo the last change.

Table 6.6. The Edit Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Zoom Out](image) | Zoom Out  
Decreases the magnification of the current page. |
| ![Best Fit](image) | Best Fit  
Adjusts the size of the image displayed in the viewer. |

Use the Field toolbar to move to the next invalid field or to clear all the fields in the validation form.

Table 6.7. The Field Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Copy](image) | Copy  
Copies the selected item. |
| ![Paste](image) | Paste |
| ![Next Invalid Field](image) | Next Invalid Field  
Navigates to the next invalid field. |
| ![Clear All Fields](image) | Clear All Fields  
Clears the content of all fields in the validation form. |
| ![Next Field](image) | Next Field (displayed only if customized)  
Navigates to the next field. |
| ![Previous Field](image) | Previous Field (displayed only if customized)  
Navigates to the previous field. |
| ![Clear Current Field](image) | Clear Current Field (displayed only if customized)  
Clears the content of the current field in the validation form. |

Customizing Toolbars

You can customize the toolbars to have quick access to various functions.

**To add a menu command to the toolbar**

1. Right-click on the toolbar and select Customize.  
The Customize window is displayed.
2. Select the Commands tab.
3. In the Commands list, select the desired menu command and drag it onto the toolbar.

**To remove a menu command from the toolbar**

1. On the right side of a toolbar, click Toolbar Options.
2 Select Add or Remove Buttons, then select the name of the toolbar containing the menu command.

3 Clear the option for the menu command.

**Status Bar**

The status bar provides status messages, navigation information, the number of invalid documents, and the state of the Insert (OVR), Num Lock (NUM) and Caps Lock (CAP) keys.

**Panels**

The Validation module has the following panels:

- **Batch Content panel**
- **Document Result panel**
- **InPlace Editor panel**
- **Document Viewer**

The layout of the preceding panels can be modified by adjusting the user interface.

**Batch Content Panel**

The Batch Content panel on the left side of the user interface contains the navigation tree with the batch content, which can be hidden when Auto Hide (floating display mode) is enabled.

**Document Result Panel**

The Document Result panel displays the classification results and the fields that need to be validated.

---

**Note** The Document Result panel is not available if Edit Batch mode is activated.

The Panel consists of the following sections:

- **Classification Result**
  At the very top of the panel, the Classification Result shows the class of the selected document. All available classes are displayed in the list. The number of valid and invalid fields is also provided.

- **Folder Fields**
  If Foldering is enabled, the folder fields are displayed in the upper part of the Document Result panel. This area may be visually separated from the document fields region, depending on the configuration options specified by your solution integrator.

  **Note** Folder fields are only displayed if foldering is applied.

- **Document Fields**
  There are different field types, such as simple fields or table fields. The display of the fields is based on the Validation Form Layout that was created by your solution integrator.

  The validation form may consist of several tabs, which display the fields and tables. If the validation form was designed for only one tab in Validation, no tab is shown. You can have several tables on a
form, and various settings enable you to anchor them or show or hide toolbars. The table status (valid or invalid) is shown in the right corner of the table toolbar. You may force a table to be valid by clicking the Make table valid button on the toolbar.

You may use Tab or Shift+Tab to move from table cell to table cell, similar to navigating through fields.

Table 6.8. Table Toolbar

<table>
<thead>
<tr>
<th>Toolbar Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Row</td>
<td>Removes the selected row from the table.</td>
</tr>
<tr>
<td></td>
<td><strong>Important</strong> This action cannot be undone by using the Undo command.</td>
</tr>
<tr>
<td>Add Row</td>
<td>Adds an empty row at the end of the table.</td>
</tr>
<tr>
<td></td>
<td><strong>Important</strong> This action cannot be undone by using the Undo command.</td>
</tr>
<tr>
<td>Insert Row</td>
<td>Inserts an empty row in the table. The row is inserted above the selected cells or table row.</td>
</tr>
<tr>
<td></td>
<td><strong>Important</strong> This action cannot be undone by using the Undo command.</td>
</tr>
<tr>
<td>Interpolate rows</td>
<td>Attempts to automatically complete a table that you have partially captured in a manual step. It is sufficient to capture one row manually with the mouse. This button is only enabled when a table row is selected.</td>
</tr>
<tr>
<td>Toggle Show Hidden Columns</td>
<td>Shows or hides columns that are defined for a table model in Project Builder.</td>
</tr>
<tr>
<td>Make table valid</td>
<td>This button is only enabled when the the table is empty.</td>
</tr>
</tbody>
</table>

**InPlace Editor Panel**

The InPlace Editor displays the portion of the image that was extracted for the current field, its contents, and an error description if the field is invalid.

The InPlace Editor may either be floated as a separate window and moved anywhere on the screen, or docked at the top or bottom of the central panel. The InPlace Editor panel may also be hidden.

**Note** This feature is not available in Batch Edit Mode.

You can right-click the InPlace Editor area to show the context menu.

**Current Error**

The Current Error area provides the error description for an invalid field in the InPlace Editor. If the InPlace Editor is not displayed, the Current Error area is displayed at the bottom of the Document Result panel.
Document Viewer

The current document is displayed in the Document Viewer.

The viewer may be floated as a separate window and moved on the screen or docked at the top, bottom, or sides of the Validation user interface. This function is disabled in Edit Batch mode.

When a field is selected on the form, the viewer displays the area of the page from which that field's data was extracted.

This default behavior can be changed by double-clicking in an empty area of the document to “freeze” the viewer display. This is especially useful when a field contains a wrong extraction result and you want to search the document for the correct one, even across pages. When frozen, the view will not change even if you edit the field on the validation form. To “unfreeze” the viewer again, double-click in an empty area of the document.

When the cursor is placed on a specific item in the current document, a word click pointer appears besides the selected field displaying the currently-selected word or number. If it is the correct field value, you can click on the item to add it to the field.

You can zoom in or out at the cursor location using the mouse wheel.

Adjusting the Panel Layout

You can Auto Hide various panels so they collapse into a tab wherever they are docked. To auto hide either of these panels, click on the pin in the panel header. Click on the pin in a panel tab to return the panel to its original location.

Note A panel needs to be docked before it can be dragged outside of the window. This means that you cannot undock a panel that has Auto Hide turned on.

Windows

The following windows are provided for Validation:

- Application Language
- Kofax CaptureObjects
- Make available for Online Learning
- Open Batch
- Page Properties
- Rejection Note
- Select Folder Class
- Settings

Application Language Window

Use this window to change the language of the Validation module user interface. You must restart the application for changes to take effect.

Selecting the Desired Application Language

Select the desired language from the list. When you start Validation for the first time, the language used is determined by the operating system.
Buttons
The following buttons are available on the window: OK Saves your settings Cancel Closes the window and discards any changes made Help Displays the Help for this window

The following buttons are available on the window:

OK. Saves your settings
Cancel. Closes the window and discards any changes made
Help. Displays the Help for this window

**Kofax Capture Objects Window**

The Kofax Capture Object window provides a list of Kofax Capture index fields.

**Table of All Kofax Capture Index Fields**

A table provides Kofax Capture index fields and their values for the selected document.

Buttons
The following buttons are available on the window: OK Saves your settings Cancel Closes the window and discards any changes made Help Displays the Help for this window

The following buttons are available on the window:

OK. Saves your settings
Cancel. Closes the window and discards any changes made
Help. Displays the Help for this window

**Make Available for Generic Online Learning Window**

Use this window to add a comment that describes why you sent the current document for Online Learning. This comment is displayed when the document is opened in Project Builder.

**Select Training Type**

The following options are available:

- **Classification.** Select this option to indicate that the classification should be changed (for example, to add the document to the classification training set or to create a new class first).
- **Extraction.** Select this option to indicate that the extraction should be updated (for example, to adjust the format locator or to change special confidence values).
- **Comment.** Type the reason you are sending the document back for Online Learning to inform your solution integrator.

Buttons
The following buttons are available on the window: OK Saves your settings Cancel Closes the window and discards any changes made Help Displays the Help for this window

The following buttons are available on the window:

OK. Saves your settings
Cancel. Closes the window and discards any changes made
Help. Displays the Help for this window

**Open Batch Window**

The Open Batch window enables you to choose which batch to open. It is displayed when:
Batches are ready for Validation when the module is started, and the “Open next batch automatically” option is not selected.

• Batches are ready for Validation when you close a batch, and the “Open next batch automatically” option is not selected.

• The window is opened from the main menu or toolbar

It provides a list of batches that are ready for Validation, one of which can be selected for processing.

**List of Batches**

A list of available batches that are ready to be processed with Validation is displayed. To sort the list by column, click on the corresponding column's label.

- **Name.** The name of the batch.
- **BatchClass.** The batch class name for the batch.
- **Date.** The date and time when the batch was created.
- **Status.** The current Kofax Capture batch status. For further details, see *Kofax Capture Help*.
- **Priority.** The priority level for processing the batch from 1 to 10, with 1 as the highest priority. For further details, see *Kofax Capture Help*.
- **StationID.** The station ID for the workstation where the batch was created. For further details, see *Kofax Capture Help*.
- **ExternalBatchID.** The Kofax Capture batch ID that is used to reference the batch outside the database.

**Buttons**
The following buttons are available on the Open Batch window. OK Saves your settings. Cancel Closes the window and discards any changes made. Refresh Updates the list of batches that are waiting for Validation. Help Accesses Help for this window.

The following buttons are available on the Open Batch window.

- **OK.** Saves your settings.
- **Cancel.** Closes the window and discards any changes made.
- **Refresh.** Updates the list of batches that are waiting for Validation.
- **Help.** Accesses Help for this window.

**Page Properties Window**

Use this window to show the file name and the full path for the page's Tiff file.

**Buttons**
The following buttons are available.

- **OK.** Closes the window and returns you to Validation.
- **Help.** Accesses Help for this window.

**Rejection Note Window**
Use this window to add a comment that describes why you have rejected the current document. When the document is opened in the Quality Control, this comment is displayed. The following options are available:

**Predefined.** This is a list of predefined comments. Select a suitable comment from the list or add your own comment to the free-form field. Any added comments are available for subsequent rejections.

**Custom.** If the list of predefined comments does not contain a suitable comment, you may enter a new comment in the custom box and click OK. This comment is automatically added to the list of predefined comments.

**Select Folder Class Window**

The following window is displayed when you either create a folder for a batch, a folder, or a document. It shows a list of available Kofax Capture folder classes to which the new folder can be assigned.

Select a folder class from the list of available classes and click OK. Click Cancel to close the window.

**Note** Use the Kofax Capture Administration module to create, rename or delete folder classes. If no folder class is available the list of available folder classes is empty.

**Buttons** The following buttons are available on the window:

- **OK.** Saves your settings
- **Cancel.** Closes the window and discards any changes made
- **Help.** Displays the Help for this window

**Settings Window**

The settings are used to define the application’s behavior.

The following tabs are available:

- **Batch Settings**
- **Colors**
- **Miscellaneous**

**Batch Settings Tab**

Use the Batch Settings tab to define behavior for the batch, for example after you have indexed the last field on a document or finished the last document of a batch.

**Last Field Accepted Behavior**

By default, a message is displayed after the last field in a document is validated. To turn this prompt off, clear the option Prompt before closing document. The document is then automatically saved without prompting.

**End of Batch Behavior**

The following options are available for configuring the end of batch behavior:
**Prompt before closing batch.** When all documents in the batch have been processed, this message is displayed by default. To turn off this prompt, clear the option. The batch automatically closes without prompting.

**Open next batch automatically.** By default, this option is enabled so that when one batch closes, the next batch automatically opens. If Poll for next batch (seconds) is selected, the module checks for batches to be processed based on the specified polling interval. If there is a batch waiting, it opens immediately.

To show suspended batches, select the Include suspended batches option.

**Colors Tab**

Use this tab to adjust the settings for colors.

**Colors for Valid Fields**

The following color settings are available for valid fields:

- **TextForeColor.** Select the color for text in valid fields on the validation form.
- **Viewer highlight zone.** Select the color for highlighting valid fields in the Document Viewer.

**Colors for Invalid Fields**

The following color settings are available for invalid fields:

- **TextForeColor.** Select the color for text in invalid fields on the validation form.
- **Viewer highlight zone.** Select the color for highlighting invalid fields in the Document Viewer.

**Miscellaneous Tab**

This tab includes options for editing and scripting.

**Editing**

**Show word-click pointer.** By default, the word-click pointer is enabled. This pointer shows the data the validation operator has selected in the OCR results in the Document Viewer. If it is the correct field value, click on the character to add it to the field in the validation form.

**Default left mouse button action.** Select one of the following options to define the behavior when you left-click and move the mouse on the document in the Document Viewer.

- **Add words to current field** - This option is selected by default. Select this option when you want to copy the content of the rectangle you draw while clicking the mouse to the current field.
- **Zoom to rectangle** - Select this option and draw a rectangle to zoom the selected area in the Document Viewer. Click to copy the selected area to the current field.
- **Pan image** - Select this option to move the image in the Document Viewer by clicking and dragging.

**Note** Remember that the left-click on the document copies the extraction result to the current field. To append the extraction result to the contents of the current field, use “CTRL + left-click.”

**Script**

By default, Activate script debugging is disabled. When selected, the Script Editor window can be displayed and scripts can be debugged in the Validation. This option should be enabled only for advanced operators. The Script Editor can be used only if this option is enabled.
Operators use Validation to manually review extraction results and to ensure that all information is valid. Documents can also be marked for online learning.

**Kofax Capture Workflow**

A batch is processed through Kofax Capture and is classified, separated and extracted before it reaches the Validation module. If there are errors with the extracted data, they can be corrected in Validation. Documents that have errors can be marked for online learning, ensuring that similar errors in future batches are resolved automatically.

After a batch has been processed through Validation, the batch (with the validated data) is passed on to additional modules to further process the extracted information. Finally, each document along with its extracted information is released to a back-end system for storage or further processing.

**Processing Batches with Validation**

You can start Validation manually like any standard Windows application or from Kofax Capture Batch Manager. If you use the Batch Manager module, Validation opens the batch, and automatically shutdown when the batch is closed or suspended.

Validation can be configured to open the next batch automatically. In this case, after starting the module or closing the current batch, any waiting batch opens automatically.

**Note** If no batches are waiting a message “No waiting batches” is displayed instead.

**To configure the option to open batches automatically**

1. From the Options menu, select Settings.
2. Select Open next batch automatically.
3. If required, select Poll for next batch (seconds) and type a value in the box.
4. If required, select Include suspended batches.

If the Open next batch automatically option is cleared, different behavior occurs when starting the module or closing the current batch. The Open Batch window is displayed, allowing you to choose a waiting batch.

**To open a batch**, select a batch from the list and click OK. The batch opens and the first document that contains a problem is displayed.

**Validate a Document**

When you open a batch in Validation, the first document having invalid fields is displayed, and the first invalid field is selected.
Note The field color can be customized in the Colors Tab of the Settings Window.

To validate a field using the keyboard

1. Type the correct value using the keyboard, making use of auto completion whenever possible.
2. Press ENTER to validate the field.
   If the field is valid, its content turns green, and the next invalid field is automatically selected.

To validate a field using the mouse

1. Using the mouse, select the correct entry from the document by either clicking the extraction result on the document or drawing a rectangle around the text.
2. Press ENTER to validate the field.
   If the field is valid, its content turns green, and the next invalid field is automatically selected.

Note When you double-click the recognition result or make a selection, the content is simultaneously copied and validated.

You can navigate within the fields, pages or documents by selecting the corresponding items from the menu or context menu, or you can click the button from the toolbar. Some shortcuts are also provided. For example, to navigate to the next field press the Tab key, or press Shift + Tab to navigate to the previous field. For details, see Shortcut Keys.

If you make changes to a document save them before moving to another document.

Batches with No Invalid Documents

If you have validated all documents in a batch or open a batch that contains only valid documents, you are prompted to close the batch. If you want to continue working on the completely valid batch, you can cancel the prompt.

Batch Editing

During Validation, the batch content is displayed as a tree. The batch tree can be used for navigation purposes. It can also be used to edit the batch and to manage the documents, folders, and batch structure. For example, you can delete or merge documents, create a folder for a document, or move a page from one document to another. Drag-and-drop functionality is for one selection at a time.

Batch editing mode is a configuration option, which may have been disabled by your solution integrator.

To enter or exit the Batch Editing mode select Edit Batch from the Batch menu or click Edit Batch on the toolbar. The validation form changes so that you can see the viewer with the document page. The batch tree is set to multiple-selection mode.

Page Operations

The following operations can be performed on pages:

- Create Document - The new document is created from the selected pages, in the same sequence as the selection and is added to the end of the set of documents.
- Add Page Before - A page is added to the document before the selected page.
- Delete - The selected page(s) are deleted.
Document Operations

The following operations can be performed with documents:

- Add Page - A page is added to the current document.
- Add Document Before - A document is added before the currently-selected document.
- Split - If a folder contains more than one document the folder content is split before the currently-selected document. The selected document (and any subsequent documents) are placed in a new folder.
- Merge - The selected documents are merged into one document. The first document of those selected in the batch tree is used as the beginning of the document. The pages of all of the other documents are added after it.
- Delete - The selected document and all of its pages are deleted.

Folder Operations

The following operations can be performed with folders:

- Cut - Cuts the selected folder.
- Add Document - A document is added to the folder.
- Delete - The selected folder and all of its contents are deleted.

Batch Operations

The following operations can be performed with batches:

- Create Folder - A folder is created in the batch root at the end of the folder list.
- Add Document - The Open TIF Files(s) for Adding as Document window is displayed to select the path and the TIF file that is added as document to the batch or folder.
- Execute Auto Foldering - Folders are created automatically. All documents with the same “content,” which is defined via script programming, are put into the same folder.

Using Drag-and-Drop

All drag-and-drop actions involve moving items from one location to another. The following table gives an overview of the available drag-and-drop operations.

Note: You can complete drag-and-drop operations with single selections only.

Table 7.1. Dragging Behavior in Validation

<table>
<thead>
<tr>
<th>Dragged Item</th>
<th>Dropped onto Batch</th>
<th>Dropped onto Folder</th>
<th>Dropped onto Document</th>
<th>Dropped onto Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder</td>
<td>The folder is inserted at the end of the batch's folder list.</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Document</td>
<td>The document is inserted at the end of the batch's document list.</td>
<td>The document is inserted at the end of the folder's document list.</td>
<td>The document is inserted before the document on which you dropped it.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Dragged Item | Dropped onto Batch | Dropped onto Folder | Dropped onto Document | Dropped onto Page
--- | --- | --- | --- | ---
Page | N/A | N/A | The page is inserted at the end of the document's page list. | The page is inserted before the page on which you dropped it.

**Page Properties**

➤ **To open the Page Properties window**

1. Select a page.
2. From the Page menu, select Properties, or right-click the page and, from the context menu that is displayed, select Properties.
   
The file name and path for the selected page is displayed.

**Character Exact Editing**

Character Exact Editing enables you to work on invalid characters directly. If a field contains an invalid character (sometimes also called “OCR rejects”), this character is selected and highlighted as soon as the field gets the focus. If you confirm the character by pressing ENTER or correcting it, the next invalid character is selected and highlighted.

A field that requires character exact editing is displayed with a special highlighting for the field's MiniViewer and the InPlace Editor. Valid characters are highlighted in green, invalid characters are highlighted in red, and the character that is selected appears highlighted in yellow.

![Character Exact Editing Example](image)

**Figure 7.1. Validation Form Character Exact Editing**

**Masked Areas**

Masked areas can be defined to hide information on a document from an operator. When the document is displayed, the Document Viewer displays the defined areas masked in either black or white, which means that they are not visible to the operator.

Documents that display masked areas have some restrictions:

- The document cannot be rotated. A warning is displayed if you try to rotate the page.
- You cannot assign another classification result.
- You cannot use Batch Edit mode.
- Lassoing the masked area in the Viewer does not return OCR results.
- You cannot debug scripts.
Showing Field Contents in Batch Tree

The contents of a field, for example a customer name or customer ID, are displayed in the batch tree instead of the document or folder class name. This may make it easier to identify specific documents or folders in the batch tree.

Displaying the contents of a field in the batch tree is a configuration option and may have been disabled by your solution integrator.

Online Learning

Within Validation, you can mark a document for Online Learning. There are two optimization and training options: generic and specific online learning.

The marked document is saved in a designated location and can later be opened in Project Builder to train or optimize the project.

To be able to return a document from the Validation module, the online learning options must have been enabled by your solution integrator.

When you mark a document for Generic Online Learning, a window is displayed where you can indicate whether the document should be returned for classification or extraction training. To inform your solution integrator you can also add a comment providing the reason for returning the document. For further details, refer to the Make available for generic Online Learning window.

When you mark a document for Specific Online Learning, the rate of recognition for fields on similar documents increases automatically during production, which is especially recommended for invoices. Because the functionality is based on remembering the layout of a sample document, it is important to mark the exact position of a field on the document. This can be done either by using the mouse to select the correct value or by typing the value and using auto completion.

You can mark a document for both Generic and Specific Online Learning any time before saving it.

Shortcut Keys

Shortcut keys can be defined or changed for any menu item in the “Customize...” menu item that is accessible from the toolbar context menu.

Important Do not use the shortcut keys reserved for the Validation module.

Read-Only Fields

Fields in the validation form may be set to read-only by your solution integrator so that an operator cannot edit them. By default, all read-only field have a valid field status.

Force Valid Field

You can manually force the status of an invalid field to “valid” by pressing CTRL + ENTER. The field is given a valid status, but it is marked with the forced valid symbol.

Note The Force Valid Field feature is a configuration option and may have been disabled by your solution integrator.

Auto Completion For Fields

Simple fields defined as text boxes allow auto completion. This feature completes the user input for the current field by OCR results found on the current document page. For each inserted character, the
input text is checked against the page's OCR results. If less than 11 matches are found, a drop-down list box appears. The matches are highlighted on the page in the Document Viewer, and the current list item is displayed in the image MiniViewer and marked with a red or green border in the Document Viewer. By default, the input text is completed with the first list item.

![Figure 7.2. Using Auto Completion](image)

You can press ENTER to validate each field or press Esc to accept the completion without validating the field. In this case the current field status is retained. Pressing Esc disables auto completion until you clear the field again. Press SHIFT+Esc to accept the completion without validating the field, but ignoring the field’s location (coordinates) on the document page, which means that the coordinates are not stored. If the completion is not the correct one, you can either continue typing additional characters or correct the selection using Backspace. If the correct item is already in the drop-down list box, use the up and down arrow keys to select the item.

The drop-down list box may contain the same entry several times, such as “93410” in the example shown in the figure above. This is because the same OCR results be may found several times on the document but at different locations. If you use specific knowledge base learning, make sure that you have selected the correct item from the list, as the geometrical information is needed to train the project correctly. If neither the mouse nor auto completion is used to fill in data in Validation, specific knowledge base learning cannot reach the best level of performance.

**Note** The auto completion feature is a configuration option, and may have been disabled by your solution integrator.

### Assigning a Class

Documents that are not classified are viewed, but as no validation form is available for unclassified documents, the validation form panel is blank.

**To assign a class to an unclassified document**

1. Select a class from the drop-down list box of available classes in the Classification Result panel.
2. Press ENTER.

   The document is assigned to the class, and the corresponding validation form is displayed.

If you reassign a class to a document that has already been classified, the validation form for the selected class may display extraction results from the original class using the new validation form, but only where the field names are identical. Where the field names are not identical, you must manually provide values for the fields using either the keyboard or the Word Click Pointer. For more information, see [Validate a Document](#).
Using the TAB Key in the InPlace Editor

The InPlace Editor is a feature that enables you to enter values into the fields on the form from a single point instead of having to navigate from one field to the next. By default the InPlace Editor is located at the bottom of the Validation window beneath the list of fields.

The InPlace Editor is automatically activated by clicking in it. If the TAB key is pressed, the InPlace Editor is updated with the value (if any) in the next field.

**Note** A field is not validated when you press TAB. You must press ENTER to validate a field.

Rejecting Pages and Documents

If you reject a page or document, it is routed to the Kofax Capture Quality Control module after the batch is closed. However, if you have activated Partial Batch Release for the batch class, the unrejected documents are routed normally and, after release, only rejected documents remain in the batch that is sent to the Kofax Capture Quality Control module.

▶ To reject a page or document

1. Select the document or page to reject.
2. Press CTRL + R or from the Edit menu, select Reject.

Alternatively, you can right-click the document or page in the Batch Content panel and select Reject from the context menu that is displayed.

When you reject a document or page, a window is displayed in which you can enter a note explaining the reason it was rejected. Either select a predefined note from the drop-down list box or type a note in the text field. For further details see the Rejection Note window.

Table Indexing

There are two different ways to manually index tables.

- **Typing** – If a table was not extracted completely, you can add missing content during validation by clicking the cell in the table and typing the text.

  **Important** If you use this method, no geometrical information about the table can be gathered (only the values are available) if you mark this document for Online Learning.

- **Using the mouse** – If a table was not found during extraction, that is not even a single row was extracted, you can create a table definition and index the table during Validation.

▶ To create the first row of a table definition

1. Click Add Row from the table toolbar.
   An empty row is inserted into the table.
2. Click in or tab to the table cell by pressing TAB.
3. Select the content from Document Viewer by either clicking the recognition result or drawing a zone around the content using the mouse.
4. Repeat steps 1 through 3 for the remaining cells in the first row.

▶ To complete remaining table definition rows

1. Select the already defined row and click Interpolate rows from the table toolbar.
   Validation tries to find missing rows in the document automatically.
2 If necessary, edit the found cells, add or insert missing rows, or delete additional rows.
   The geometrical information gathered by manually indexing the table is saved and can be
   reused for Online Learning.

**Database Lookups**

Your solution integrator can configure a validation form to include a database lookup button. When
available, use of this button can assist with document validation.

---

**Important** The name of your database lookup button may differ from one of the following instructions.
Please contact your solution integrator if you have any questions.

---

**To run a database lookup,** Click the Database Lookup button.

Depending on how your solution integrator has configured the database lookup, either the search
happens immediately and populates fields with results, or a search result window is displayed. The
search results window provides one of the following three types of results:

1 **Individual editable search fields**
2 **Read-only results for selection**
3 **Single search fields**

---

**Individual Search Fields Window**

This window enables you to perform searches or select a record that overrides the current field values
in the selected document.

---

**Important** The title of this window is configured by your system integrator.

---

**To perform a search**

1 Type a correct value into one or more of the column fields.
2 Click Search.
   A successful search returns one or more rows of data.

---

**To select a search record**

1 Compare the search results with the corresponding values on the image.
2 Select the row by clicking on its row number on the left of the table.
3 Click OK.
   This selected record is inserted into the corresponding validation fields.

---

**Search Immediately**

If this option is enabled by your solution integrator, it uses existing field data for mapped fields, and
runs a database lookup when you click the Database Lookup button. If there is a single match in
the database, validation fields are automatically populated with values from the database. If there are
multiple results, they are listed as options that you can select in the search results window.

---

**Shortcut Keys**

<table>
<thead>
<tr>
<th>Keystrokes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Opens the Help for this window</td>
</tr>
<tr>
<td>Keystrokes</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>F2</td>
<td>Enters cell edit mode</td>
</tr>
<tr>
<td>LEFT ARROW</td>
<td>Navigates to the column on the left</td>
</tr>
<tr>
<td>RIGHT ARROW</td>
<td>Navigates to the column on the right</td>
</tr>
<tr>
<td>UP ARROW</td>
<td>Navigates to the row above the current position</td>
</tr>
<tr>
<td>DOWN ARROW</td>
<td>Navigates to the row below the current position</td>
</tr>
<tr>
<td>ENTER</td>
<td>Exits cell edit mode. Press again to start the search</td>
</tr>
<tr>
<td>CTRL + ENTER</td>
<td>Selects a database record and closes the window</td>
</tr>
<tr>
<td>DELETE</td>
<td>Deletes the content of a cell</td>
</tr>
<tr>
<td>ESC</td>
<td>Closes the window</td>
</tr>
</tbody>
</table>

**Buttons**

The following buttons are available on the window:

- **OK.** Overwrites existing data with the selected record values
- **Cancel.** Closes the window and discards any changes made
- **Help.** Displays the Help for this window

**Read-Only Search Results Window**

This window enables you to select a record from a list of suggested results that can override the current field values in the selected document.

**To select a suggested result**

1. Compare the suggested results with the corresponding values on the image.
2. Select the desired row by clicking on its row number on the left of the table.
3. Click OK.

The selected result is inserted into the corresponding validation fields.

**Shortcuts**

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Opens the Help for this window</td>
</tr>
<tr>
<td>UP ARROW</td>
<td>Navigates to the row above the current position</td>
</tr>
<tr>
<td>DOWN ARROW</td>
<td>Navigates to the row below the current position</td>
</tr>
<tr>
<td>ENTER</td>
<td>Selects a suggested result and closes the window</td>
</tr>
<tr>
<td>Esc</td>
<td>Closes the window</td>
</tr>
</tbody>
</table>

**Buttons**

The following buttons are available on the window:

- **OK.** Overwrites existing data with the selected record values
- **Cancel.** Closes the window and discards any changes made
- **Help.** Displays the Help for this window
OK. Overwrites existing data with the selected record values
Cancel. Closes the window and discards any changes made
Help. Displays the Help for this window

**Single Search Field Results Window**

This window enables you to enter one or more search keywords or strings in a single editable field.

**Tip** Separate search keywords or strings with a space, comma, or semicolon. You can increase your search results by entering additional keywords.

- **To perform a search**, type one or more keywords or strings, and click Search.
- **To select a search record**
  1. Compare the search results with the corresponding values on the image.
  2. Select the row by clicking on its row number on the left of the table.
  3. Click OK.

  The selected record is inserted into the corresponding validation fields.

**Shortcuts**

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Opens the Help for this window</td>
</tr>
<tr>
<td>UP ARROW</td>
<td>Navigates to the row above the current position</td>
</tr>
<tr>
<td>DOWN ARROW</td>
<td>Navigates to the row below the current position</td>
</tr>
<tr>
<td>ENTER</td>
<td>Selects a suggested result and closes the window</td>
</tr>
<tr>
<td>Esc</td>
<td>Closes the window</td>
</tr>
</tbody>
</table>

**Buttons**
The following buttons are available on the window:

- OK. Overwrites existing data with the selected record values
- Cancel. Closes the window and discards any changes made
- Help. Displays the Help for this window

The following buttons are available on the window:

- OK. Overwrites existing data with the selected record values
- Cancel. Closes the window and discards any changes made
- Help. Displays the Help for this window

**Shortcut Keys**

The following table lists the shortcut keys that can be used in Kofax Transformation Modules - Validation.

**Table 7.2. Shortcut Keys for Validation**

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + O</td>
<td>Opens a batch (no effect if Validation is processed by selecting a batch in Kofax Capture Batch Manager)</td>
</tr>
</tbody>
</table>
### Shortcut Key | Description
--- | ---
CTRL + S | Suspends a batch
CTRL + Z | Undoes the previous operation
CTRL + Y | Redoes the previous operation
CTRL + P | Navigates to the next document
CTRL + SHIFT + F | Navigates to the last document
CTRL + G | Navigates to a defined document
CTRL + R | Rejects a document
CTRL + SHIFT + B | Navigates to the previous page
CTRL + B | Navigates to the next page
F4 | Inserts the last value
TAB | Navigates to the next field (the next field is selected according to the field order that is defined by the validation form)
SHIFT + TAB | Navigates to the previous field
ENTER | Validates the currently-selected field and shows the next invalid field or table cell
ESC | Shows the next invalid field or table cell without validating the current field (works only for fields that have auto completion enabled)
SHIFT + ESC | Shows the next invalid field or table cell without validating the current field and additionally ignores the field’s location (the current completion is accepted, but the field’s location (coordinates) on the document page is not stored; works only for fields that have auto completion enabled)

### Customizing Shortcut Keys

You can customize the shortcut keys.

**To customize a shortcut key**

1. Right-click on the toolbar and select Customize. The Customize window is displayed.
2. Click Keyboard. The Customize Keyboard window is displayed.
3. In the Commands list, select a menu command whose shortcut key you want to customize.
4. In the Specify a Shortcut list, select the new shortcut key.
Chapter 8

Quick Tour of Verification

Verification has a menu and a toolbar for quick access to various features and commands. Below these, the interface is usually divided into four main areas. On the left a navigation tree displays the contents of the batch. In the center, there is a field editing panel which displays the verification form. On the right, a document viewer displays the current document. At the bottom of the form the Current Error area is displayed.

A status bar is displayed along the bottom of the window and provides additional information to the user.

The following figure shows the default user interface for Verification with a batch opened. The layout of the user interface can be customized by your solution integrator using Project Builder.

![Figure 8.1. Kofax Transformation Modules - Verification Interface](image)

Batch Content panel
Menu Bar

Verification provides a standard, Windows-style menu bar with the following menus:

- **Batch**
- **Edit**
- **View**
- **Folder**
- **Document**
- **Page**
- **Field**
- **Options**
- **Help**

**Batch Menu**

The following options are available:

- **Open** – displays the list of all available batches so you can select one to open.
- **Close** – closes the current batch.
- **Suspend** – suspends the current batch.
- **Execute Auto Foldering** – performs the script code that has been implemented in the `PerformAutofoldering` event handler. It can be used, for example, to create folders and put all documents with the same vendor ID into one folder.
- **Exit** – closes the Verification module.

**Edit Menu**

The following options are available:

- **Reject** – rejects the currently-selected document or page.
- **Unreject** – unrejects the currently-selected document or page.

**View Menu**

The following options are available:

- **Zoom In** – increases the magnification of the current page in the image viewer.
- **Zoom Out** – decreases the magnification of the current page in the image viewer.
- **Best Fit** – fits the image size to the viewer.
- **Zoom to** – select one of the available options to zoom to the top left, top right, bottom left or bottom right corner of the first, last or current page.
Quick Tour of Verification

- Automatic Focus – turns the mode on/off to automatically focus the highlighted field result on the page/document.
- Display Color Image – toggles between the color and binary image of the document, if available.
- Batch Content – displays/hides the Batch Content panel on the left side of the window.
- Viewer – the following options are available:
  - Float – select to float the panel as a separate window and move it on the screen.
  - Docking Position – select Left, Right, Top or Bottom to dock the window at top or bottom, or sides of the Verification window.
- Reset Window Positions – this option resets docked windows to the default settings.

Folder Menu

The following options are available:

- First – navigates to the first folder in the batch.
- Previous – navigates to the previous folder in the batch.
- Next – navigates to the next folder in the batch.
- Last – navigates to the last folder in the batch.

Document Menu

The following options are available:

- First – navigates to the first document in the batch.
- Previous – navigates to the previous document in the batch.
- Next – navigates to the next document in the batch.
- Last – navigates to the last document in the batch.
- Go To – navigates to the given document number in the batch.

Page Menu

The following options are available:

- Properties – shows the properties of the currently-selected page.
- First – navigates to the first page in the document.
- Previous – navigates to the previous page in the document.
- Next – navigates to the next page in the document.
- Last – navigates to the last page in the document.

Field Menu

The following options are available:

- Set Field to Not Verified – changes the field to the state it was in before it was verified
- Previous – selects the previous field in the tab sequence.
- Next – selects the next field in the tab sequence.
- Next Not Verified Field – selects the next field requiring verification.
Options Menu

The following options are available:

- Show Script – opens the Script Code window to debug the script. For debugging (for example, to set a breakpoint and then check the value of a variable), the option Activate script debugging must be enabled on the Miscellaneous tab of the Settings window. Script debugging for the Verification module may be made unavailable by your solution integrator.
- Select Language – enables you to select one of the available languages for the application interface.
- Settings – shows the settings window that is used to make user specific settings.

Help Menu

The following options are available:

- Contents – opens the Help for the Verification module.
- About – shows some information about the Verification module.

Context Menus

The contents of the batch, folder, document and page context menus depend on the working mode and the item selected.

**Note** Only a single batch, folder, document or page can be selected.

Batch Context Menu

The following options are available:

- Open – displays a list of batches which can be opened. This is disabled if Verification is started from the Kofax Capture Batch Manager module.
- Close – closes the current batch.
- Suspend – suspends the current batch.

Folder Context Menu

The following options are available:

- First – navigates to the first folder in the batch.
- Previous – navigates to the previous folder in the batch.
- Next – navigates to the next folder in the batch.
- Last – navigates to the last folder in the batch.

Document Context Menu

The following options are available:

- Reject – rejects the currently-selected document. The Rejection Note window is displayed.
- Unreject – unrejects the currently-selected document. Unreject is only enabled in the menu if you have selected a document that is already rejected.
Quick Tour of Verification

■ First – navigates to the first document in the batch.
■ Previous – navigates to the previous document in the batch.
■ Next – navigates to the next document in the batch.
■ Last – navigates to the last document in the batch.
■ Go To – navigates to the given document number in the batch.

Page Context Menu

The following options are available:

■ Reject – rejects the currently-selected page. The Rejection Note window is displayed.
■ Unreject – unrejects the currently-selected page. Unreject is only enabled in the menu if you have
  selected a document that is already rejected.
■ Properties – the properties of the currently-selected page are displayed.
■ First – navigates to the first page in the document.
■ Previous – navigates to the previous page in the document.
■ Next – navigates to the next page in the document.
■ Last – navigates to the last page in the document.

Toolbars

The toolbars provide shortcuts to many menu items and gives you quick access to all important features.

Use the Batch toolbar to manage batches.

Table 8.1. The Batch Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Open Batch</td>
</tr>
<tr>
<td></td>
<td>Displays the list of available batches so you can select one to open.</td>
</tr>
<tr>
<td></td>
<td>Suspend Batch</td>
</tr>
<tr>
<td></td>
<td>Suspends the current batch.</td>
</tr>
<tr>
<td></td>
<td>Close Batch</td>
</tr>
<tr>
<td></td>
<td>Closes the current batch.</td>
</tr>
</tbody>
</table>

Use the Folder toolbar to navigate the folders in the current batch.

Table 8.2. The Folder Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First</td>
</tr>
<tr>
<td></td>
<td>Navigates to the first folder in the batch.</td>
</tr>
<tr>
<td></td>
<td>Previous</td>
</tr>
<tr>
<td></td>
<td>navigates to the previous folder in the batch.</td>
</tr>
</tbody>
</table>
Use the Document toolbar to navigate the documents in the current folder or batch. Additionally there is an option to make the current document available for Online Learning. This is a configuration option and may have been disabled by your solution integrator.

Table 8.3. The Document Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Next Icon](image) | Next Document
Navigates to the next document in the folder or batch. |
| ![Last Icon](image) | Last Document
Navigates to the last document in the folder or batch. |

Use the Page toolbar to navigate or rotate the pages in the current document.

Table 8.4. The Page Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![First Icon](image) | First
Navigates to the first page in the current document. |
| ![Previous Icon](image) | Previous
Navigates to the previous page in the current document. |
| ![Next Icon](image) | Next
Navigates to the next page in the current document. |
<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Last</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Navigates to the last page in the current document.</td>
</tr>
</tbody>
</table>

Use the View toolbar to adjust the size of the image displayed in the viewer.

**Table 8.5. The View Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Zoom In</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Increases the magnification of the current page.</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Zoom Out</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Decreases the magnification of the current page.</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Best Fit</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Adjusts the size of the image displayed in the viewer.</td>
</tr>
</tbody>
</table>

Use the Field toolbar to move to the next invalid field or to clear all the fields in the Verification form.

**Table 8.6. The Field Toolbar**

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Set Field to Not Verified</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Next Field (displayed only if customized)</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Navigates to the next field.</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Next Invalid Field</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Navigates to the next invalid field.</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Previous Field (displayed only if customized)</td>
</tr>
<tr>
<td><img src="image" alt="icon" /></td>
<td>Navigates to the previous field.</td>
</tr>
</tbody>
</table>

**Customizing Toolbars**

You can customize the toolbars to have quick access to various functions.

**To add a menu command to the toolbar**

1. Right-click on the toolbar and select Customize. The Customize window is displayed.  
2. Select the Commands tab.  
3. In the Commands list, select the desired menu command and drag it onto the toolbar.

**To remove a menu command from the toolbar**

1. On the right side of a toolbar, click Toolbar Options.  
2. Select Add or Remove Buttons, then select the name of the toolbar containing the menu command.
Clear the option for the menu command [✓].

Panels

The following panels are part of Verification:

- **Batch Content**
- **Document Results**
- **Document Viewer**

The Document Viewer can be undocked and repositioned. The Current Error area is displayed at the bottom of the form.

**Batch Content Panel**

The Batch Content panel on the left side of the interface displays the navigation tree with the batch contents. The batch content can be hidden when Auto Hide (floating display mode) is enabled.

**Document Result Panel**

The Document Result panel displays the fields that need to be verified.

The panel consists of the following sections:

- **Folder Fields**

  If foldering is enabled, the folder fields are displayed in the upper part of the Document Result panel. This area may be visually separated from the document fields region, depending on the configuration options specified by your solution integrator.

  **Note** Folder fields are only displayed if foldering is applied.

- **Document Fields**

  The display of the fields is based on the verification form layout that was created by your solution integrator.

  The verification form may consist of several tabs that show the fields and tables. If the verification form was designed for only one tab in Verification, no tab is shown.

**Document Viewer**

The Document Viewer displays the current document.

The viewer may be floated as a separate window and moved on the screen or docked at the top, bottom, or sides of the Verification window.

When a field is selected on the form, the viewer displays the area of the page from which that field's data was extracted. Fields requiring verification are displayed in red, and fields that have been verified are displayed in green.

**Note** You can customize the Document Viewer highlight colors for verified fields and fields requiring verification on the Colors tab of the Settings window.

This default behavior can be changed by double-clicking in an empty area of the document to “freeze” the viewer display. This is especially useful when a field contains a wrong extraction result and you want to search the document for the correct one, even across pages. When frozen, the view does not...
change even if you edit the field on the verification form. To “unfreeze” the viewer again, double click in an empty area of the document.

You can zoom in or out at the cursor location using the mouse wheel.

**Adjusting the Panel Layout**

You can Auto Hide various panels so they collapse into a tab wherever they are docked. To auto hide either of these panels, click on the pin in the panel header. Click on the pin in a panel tab to return the panel to its original location.

**Note** A panel needs to be docked before it can be dragged outside of the window. This means that you cannot undock a panel that has Auto Hide turned on.

**Status Bar**

The status bar provides status messages, navigation information, the number of documents requiring verification, and the state of the Insert (OVR), Num Lock (NUM) and Caps Lock (CAP) keys.

**Windows**

The following windows are available in Verification:

- Application Language
- Open Batch
- Settings
- Rejection Note
- Page Properties

**Application Language Window**

Use this window to change the language of the Verification module user interface. You must restart the application for changes to take effect.

**Selecting the Desired Application Language**

Select the desired language from the list. When you start Verification for the first time, the language used is determined by the operating system.

**Buttons** The following buttons are available on the window: OK Saves your settings Cancel Closes the window and discards any changes made Help Displays the Help for this window

The following buttons are available on the window:

- **OK.** Saves your settings
- **Cancel.** Closes the window and discards any changes made
- **Help.** Displays the Help for this window

**Open Batch Window**

The following window is displayed when:
Batches are ready for Verification when the module is started, and the Open next batch automatically option is not selected.

Batches are ready for Verification when you close a batch, and the Open next batch automatically option is not selected.

The window is opened from the main menu or toolbar.

It provides a list of batches that are ready for Verification, one of which can be selected for processing.

**List of Batches**

A list of available batches that are ready to be processed with Verification is displayed. To sort the list by column, click on the corresponding column's label.

- **Name.** The name of the batch.
- **BatchClass.** The batch class name for the batch.
- **Date.** The date and time when the batch was created.
- **Status.** The current Kofax Capture batch status. For further details, see Kofax Capture Help.
- **Priority.** The priority level for processing the batch from 1 to 10, with 1 as the highest priority. For further details, see Kofax Capture Help.
- **StationID.** The station ID for the workstation where the batch was created. For further details, see Kofax Capture Help.
- **ExternalBatchID.** The Kofax Capture batch ID that is used to reference the batch outside the database.

**Buttons**

The following buttons are available on the Open Batch window.

- **OK.** Saves your settings.
- **Cancel.** Closes the window and discards any changes you made.
- **Refresh.** Updates the list of batches that are waiting for Verification.
- **Help.** Accesses the Help for this window.

**Settings Window**

The settings are used to define the application’s behavior.

The following tabs are available:

- **Batch Settings**
- **Colors**
- **Miscellaneous**

**Batch Settings Tab**

Use the Batch Settings tab to define behavior for the batch after you have verified the last field on the last document of a batch.

**End of Batch Behavior**

The following options are available for configuring the end of batch behavior:
Prompt before closing batch. When all documents in the batch have been processed, this message is displayed by default. To turn off this prompt, clear the option. The batch automatically closes without prompting.

Open next batch automatically. By default, this option is enabled so that when one batch closes, the next batch automatically opens. If Poll for next batch (seconds) is selected, the module checks for batches to be processed based on the specified polling interval. If there is a batch waiting, it opens immediately.
To show suspended batches, select the Include suspended batches option.

Colors Tab
Use this tab to adjust the settings for the displayed colors of fields which have been verified and are yet to be verified.

Colors for Verified Characters
The following options are available for fields which require verification.

Text ForeColor. From the drop down list, select the color used to display the text within fields which have not yet been verified.

Viewer highlight zone. Select the color from the drop down list that is used for the highlight color in the Document Viewer.

Colors for Not Verified Characters
The following options are available for fields which have been verified.

Text ForeColor. From the drop down list, select the color used to display the text within fields which have been verified.

Viewer highlight zone. Select the color from the drop down list that is used for the highlight color in the Document Viewer.

Miscellaneous Tab
This tab includes editing options.

Editing
The following options are available for editing:

Default left mouse button action. Select one of the following options to define the behavior when you left-click and move the mouse on the document in the Document Viewer.
- Zoom to rectangle - Select this option and draw a rectangle with the left mouse to zoom the selected area in the Document Viewer.
- Pan image - Select this option to move the image in the Document Viewer while left-clicking and moving the mouse.

Script
By default, Activate script debugging is disabled. When selected, the Script Editor window can be displayed and scripts can be debugged in Verification. If a runtime error occurs, a message is displayed that gives you the option to debug the script for this error.

Note If the option is unavailable script debugging for the Verification module has been made unavailable by your solution integrator.
Rejection Note Window

Use this window to add a comment that describes why you have rejected the current document. When the document is opened in Quality Control, this comment is displayed. The following options are available:

**Predefined.** This is a list of predefined comments. Select a suitable comment from the list or add your own comment to the free-form field. Any added comments are available for subsequent rejections.

**Custom.** If the list of predefined comments does not contain a suitable comment, you may enter a new comment in the custom box and click OK. This comment is automatically added to the list of predefined comments.

Page Properties Window

Use this window to show the file name and the full path for the page's Tiff file.

**Buttons**

The following buttons are available:

**OK.** Closes the window and returns you to Kofax Transformation Modules - Verification.

**Help.** Accesses the Help for this window.
Chapter 9

How Do I Use Verification?

The goal of Verification is to ensure that the data processed by previous modules is accurate before being released to a back-end system. Verification allows comprehensive verification of critical data fields using a keyboard-optimized interface. Verification works on one batch at a time and allows the processing of fields in three modes: confirmation (by pressing a single key to accept the data), blind double keying (a more comprehensive verification technique) and reviewing the fields in a read-only state.

Kofax Capture Workflow

A batch is processed through Kofax Capture, and all of the data is extracted and validated before it reaches Verification. If any fields require verification, the fields can be confirmed, double keyed, or reviewed.

After leaving Verification the batch, along with the verified data, is released to a back-end system for storage or further processing.

Important Some of the features documented this section may not be applicable in your solution. Please check with your solution integrator regarding areas of functionality that seem irrelevant to you.

Processing Batches with Verification

Verification can be started manually like any standard Windows application or from Kofax Capture Batch Manager. If started from Batch Manager, Verification opens the batch, and then automatically shutdown when the batch is closed or suspended.

Verification can be set to “Open next batch automatically.” In this case, after starting the module or closing the current batch, the next waiting batch is opened automatically.

Note If no batches are waiting a message “No waiting batches” is displayed instead.

To configure the option to open batches automatically

1. From the Options menu, select Settings.
2. Select Open next batch automatically.
3. If required, select Poll for next batch (seconds) and type a value in the box.
4. If required, select Include suspended batches.

If the Open next batch automatically option is cleared, different behavior occurs when starting the module or closing the current batch. The Open Batch window is displayed, allowing you to choose a waiting batch.

To open a batch, select a batch from the list and click OK. The batch opens and the first document that contains a problem is displayed.
Verification Mode

Each field needs to be verified in one of the following ways.

- **Confirm** (pressing a single key to accept the data)
- **Blind double keying** (re-keying the field with no knowledge of the original value)
- **Read-only** (reviewing the field in a read-only state)

**Confirm**

Some fields may require verification in “confirm” mode. If this is the case, you need to review the original data by comparing it against the image and pressing a single key to confirm it is correct.

![CreditCardNumber](image)

**Figure 9.1. Field Requiring Confirmation**

**Confirming Fields**

A field can be confirmed as follows.

1. Review the image and edit the data if required.
2. Press ENTER. The field is marked with the verified icon and you are prompted to save the document.
3. Press ENTER to save the document and continue to the next document.

**Blind Double Keying**

Some fields may require verification in “blind double keying” mode. If this is the case, you are presented with an empty field in which you can type the data for the entire field from the image.

![CreditCardNumber](image)

**Figure 9.2. Field Requiring Double Keying**

1. Type the value of the field from the image.
2. Press ENTER. The value is either accepted or is a mismatch. (For details, see the following description.)

**Value Mismatch**

If the value you type does not match the original value (from the original document), you are prompted to type the data once again to confirm that it is correct. Depending on the options specified by your solution integrator, you may be provided with the original value text with which to compare the data.
To resolve a mismatch

1. Type the value as it is displayed on the image. This must be either a value that matches the:
   - original value
   - correct value (in the event that the original value is incorrect and you want to correct it)
2. Press ENTER.

Value Accepted

When the value is accepted, the field is marked with the verified icon, and you are prompted to save the document. Press ENTER to save the document and continue to the next document.

Read-Only

Your solution integrator can provide additional fields that are near a field that needs to be verified. These fields provide additional information and context so you can be sure that the field you verify contains the correct information.

Figure 9.3. Field Requiring No Verification

Rejecting Pages and Documents

If you cannot verify a field, you can reject a page or document. This sends the document or page to Quality Control where it can be reviewed and corrected by a Quality Control operator.

To reject a document or page

1. Select the document or page to reject.
2. From the Edit menu, select Reject.
3. Type the reason for rejecting the page or document in the window or select a reason from the predefined list. The page or document is marked with the rejection icon.

Navigating Within a Batch

Navigation within Verification is handled automatically, as is displayed only for those fields that require verification and moves to the next field once the field has been verified. However, it is possible to manually navigate forward and backward through all the fields.

Navigate to the next field by pressing TAB.
Navigate to the next document by pressing CTRL + P.
Navigate to the next field requiring verification by pressing CTRL + N.

Closing a Batch

When the last field in a batch has been verified, a window is displayed. From this window, you can either close the batch or stay in the current batch to review the verified fields.

Note You can disable this window on the Batch Settings tab of the Settings window.
Debugging Scripts

The Verification module supports scripting to display labels on a verification form translated for the currently-selected language or provide special logging functionality, for example. If the option Activate script debugging is selected on the Miscellaneous tab of the Settings window, a runtime error will open the Script Code window where you can debug the implemented code. For debugging, you can set breakpoints and analyze the script by checking the value of a variable, for example. By default, the option Activate script debugging is disabled. For further details, refer to the Scripting Help.

Note Your solution integrator may have made the ability to debug scripts unavailable to you.

To debug a script

1. Enable script debugging for Verification, and complete the following steps.
   a. Start the Verification module.
   b. From the Options menu, select Settings.
   c. Click the Miscellaneous tab.
   d. From the Script panel, select Activate script debugging, and click OK to close the window.

2. From the Options or context menu, select Show Script.
   The WinWrap Basic Script Code window is displayed.

3. Select the correct sheet and insert a breakpoint, for example.
   At runtime, processing will stop at the inserted breakpoint so that you can check the content or variables or how processing will be continued.

Shortcut Keys

The following table lists the shortcut keys that can be used in Verification.

Table 9.1. Shortcut keys for Verification

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + O</td>
<td>Opens a batch</td>
</tr>
<tr>
<td>CTRL + L</td>
<td>Closes a batch</td>
</tr>
<tr>
<td>CTRL + S</td>
<td>Suspends a batch</td>
</tr>
<tr>
<td>F4</td>
<td>Sets a field to “not verified”</td>
</tr>
<tr>
<td>TAB</td>
<td>Navigates to the next field (the next field is selected according to the field order that is defined by your solution integrator)</td>
</tr>
<tr>
<td>SHIFT + TAB</td>
<td>Navigates to the previous field</td>
</tr>
<tr>
<td>ENTER</td>
<td>Verifies the current field and shows the next field that requires verification</td>
</tr>
<tr>
<td>CTRL + N</td>
<td>Navigates to the next not verified field</td>
</tr>
<tr>
<td>CTRL + P</td>
<td>Navigates to the next document</td>
</tr>
<tr>
<td>CTRL + SHIFT + P</td>
<td>Navigates to the previous document</td>
</tr>
</tbody>
</table>
How Do I Use Verification?

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + F</td>
<td>Navigates to the first document</td>
</tr>
<tr>
<td>CTRL + SHIFT + F</td>
<td>Navigates to the last document</td>
</tr>
<tr>
<td>CTRL + G</td>
<td>Navigates to a defined document</td>
</tr>
<tr>
<td>CTRL + R</td>
<td>Rejects a document</td>
</tr>
<tr>
<td>CTRL + SHIFT + B</td>
<td>Navigates to the previous page</td>
</tr>
<tr>
<td>CTRL + B</td>
<td>Navigates to the next page</td>
</tr>
</tbody>
</table>

**Customizing Shortcut Keys**

You can customize the shortcut keys.

**To customize a shortcut key**

1. Right-click on the toolbar and select Customize. The Customize window is displayed.
2. Click Keyboard. The Customize Keyboard window is displayed.
3. In the Commands list, select a menu command whose shortcut key you want to customize.
4. In the Specify a Shortcut list, select the new shortcut key.
A

Activation
The process of enabling your Kofax Transformation Modules licensing.

Adaptive Feature Classifier
The Adaptive Feature Classifier (AFC) performs an analysis of the textual representation of a document and automatically classifies it into a class.

Address Evaluator
An evaluator that compares address fields that are extracted with a zone locator (for example zip code, city or street) to the values in a database, and if required corrects the field data.

Alternative
See Detected Alternatives

Amount Formatter
A group of related settings that govern how amounts are formatted after extraction. For example, ensuring that a total value adds up to its component values.

Application Programming Interface
A set of routines used to direct the performance of procedures in an application group. Allows custom module developers to take advantage of the many capabilities build into Kofax Transformation Modules.

Autoclustering
Automatically clusters images into similar groups to speed up processing. See Image clustering.

Automatic Foldering
After foldering is set up, folder levels and the script programming and if needed, folder fields and validation rules for folders, you can apply foldering to a set of test documents. Folders are created and the documents resorted into the corresponding folder. If defined the folder fields are extracted and validated.

B

Bar code
A special identification code printed as a series of bars, dots, or other shapes. A bar code has build in error checking, and may contain text, number, or both.

Batch
A Batch is a group of documents (or folders) that are run through Kofax Capture based on a Batch Class.

Batch Class
A Batch Class describes how the documents in a batch are processed by Kofax Capture. It includes which Kofax Transformation Modules and Kofax Capture modules are used to process images, and in what order. It also determines how images are separated into documents, how forms are identified and how images are cleaned up.

Each batch class can contain one or more classes. Each class can contain one or more form types. This ensures you are able to have different kinds of documents or forms within a single batch.

Best Fit
This Document Viewer option fits the selected image to the page.

Blank Out Regions
This option enables you to remove non-relevant text areas or characters from a document so they are ignored by a locator.
### Glossary

<table>
<thead>
<tr>
<th><strong>C</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Class</strong></td>
</tr>
<tr>
<td><strong>Classification</strong></td>
</tr>
<tr>
<td><strong>Classifier</strong></td>
</tr>
<tr>
<td><strong>Clustering</strong></td>
</tr>
<tr>
<td><strong>Confidence</strong></td>
</tr>
<tr>
<td><strong>Context Menu</strong></td>
</tr>
<tr>
<td><strong>Content Classification</strong></td>
</tr>
<tr>
<td><strong>Correction</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>D</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Database</strong></td>
</tr>
<tr>
<td><strong>Date Formatter</strong></td>
</tr>
<tr>
<td><strong>Default Validation Form</strong></td>
</tr>
<tr>
<td><strong>Detected Alternatives</strong></td>
</tr>
<tr>
<td><strong>Dictionary</strong></td>
</tr>
</tbody>
</table>
For example, a dictionary can contain a list of calendar months. Each month can also be paired with a numerical value. This means that when extraction runs, the alphabetic name of the month is replaced with the numerical value.

**Document Review**

Document Review is a module that allows keyboard operators to ensure that every document in a batch contains the correct pages and has the correct classification.

Users are presented with a list of problems that have failed Document Review rules and must be fixed.

**Document Separation**

The process of taking on large document and splitting it into several smaller documents using any of the Kofax Transformation Modules classification methods.

**Dongle**

See *Hardware key*.

**Dynamic Zone Adjustment**

An option in the Advanced Zone Locator that automatically increases the size of a zone so it includes all necessary content. This means that if a zone is created on one image so all content is well within the boundaries, the zone can be automatically adjusted if another image's content is slightly shifted.

Dynamic zone adjustment can done in four directions. To the top, bottom, left and right of a zone.

**E**

**Evaluator**

A class of engines that compares multiple possible results to determine the best choice among them.

**Extraction**

The process in which a recognition engine identifies information on a document that can later be used to identify specific characters.

**F**

**Field**

A field is a piece of extracted data.

**Field Formatter**

A group of related settings that govern how items (such as dates or monetary amounts) are formatted after extraction.

**Folder**

A folder is a directory within a batch that is used to sort the batches documents for additional criteria, for example a supplier name or a customer ID.

For a Kofax Transformation Modules project you have to enable foldering and define folder levels. For each folder level you can define a sub folder, folder fields and validation rules.

The folder and its sub folders, in a batch is always an instance of a folder level that is defined in the project.

**Foldering**

If foldering is defined, you can sort documents of a batch for similar criteria, for example a customer ID, supplier name. So called folder are created and the documents are sorted to those folders. Similar to “normal” extraction fields, defined for a class, you can define folder fields. Those fields are extracted after the resorting and if available, validation rules are applied.

**Folder Level**

To be able to sort the documents according to similar criteria like for example, the customer ID, you define folder level for a project. For each folder level you can only define one sub folder level. For each folder level you can create folder fields and validation rules.

If foldering is enabled, the server creates the folders for a batch, resorts the documents and extracts the folder fields. A batch may now contain several
folders, but at the same hierarchy level you always have the same type of folder, for example, one folder for the documents of supplier A, another folder for supplier B and a third folder for supplier C.

**Formatting**

**G**

**Generic Learning**
A learn-by-example technology that uses a knowledge base to extract information from invoice documents. Extraction is based on keywords, data format and position. These are generalized so they can be applied to unseen images from new suppliers.

**Generic Online Learning**
Performed on-the-fly without the need for administrator intervention. Keyboard operators identify documents where extraction was not successful and they are automatically processed by the Knowledge Base Learning Server.

**H**

**Hardware Key**
A device that plugs into a computer to prevent the unlicensed use of Kofax Transformation Modules.

**I**

**Image Clustering**
A process in which documents are grouped by geometric similarity in order to speed up layout classification setup.

**Installation**
The act of copying essential application files to your system and preparing it for use. The installation process is usually automated by an installation or setup application or by a wizard.

**Instruction Classification**
A process in which documents are grouped by geometric similarity in order to speed up layout classification setup.

**Instruction Classifier**
The instruction classifier searches for given phrases in the text representation and uses predefined rules to classify it.

**K**

**Keying Modules**
Designed for operator use to ensure that all documents have been successfully classified and extracted by the automatic server modules.

**Knowledge Base**
A repository of information about invoice documents that contains data on keywords, data formats, positions, and supplier information (for specific knowledge bases).

**L**

**Language Pack**
A file used to change the application language for Kofax Transformation Modules.

**Layout Classifier**
An layout classifier that performs image-based classification by analyzing the graphical elements of an image without the need for OCR.

**Locator**
A configurable option that enables you to extract different types of data from a document.

**M**

**Menu**
A list of options that allow a user to make a selection in order to perform a desired action.
Multiple Validation Steps

In a workflow, validation capabilities may be needed several times, for example that different users can validate subsets of fields only. Therefore the Validation module can be added up to five times to the queue of the Kofax Capture batch class.

ODBC

A standard method for connecting to different types of databases, independent of programming languages or operating system used.

Online Learning

See Specific online learning or Generic online learning.

Optical Character Recognition

The ability of software to recognize printed characters and translate them into computer-readable data.

Optical Mark Recognition

The ability of software to recognize marked areas on forms and convert the date to a format that can be processed by the software. The marks are typically created by filling in a circle or marking a check in a check box on a preprinted form.

Percentage Formatter

A group of related settings that govern how percentages are formatted after extraction.

Problem (Document Review)

One or more failed Document Review rules.

Recognition

The process by which computers can interpret handwritten characters or other marks in an image and convert them to computer-readable data.

Regular Expression

A method of describing data in an abstract way to recognize patterns within textual data.

Server

Automatically separates a batch into documents and then classifies and extracts information from each document. A second instance of server can be used to automatically extract information from already separated and classified documents.

Separation

The process by which individual pages are arranged into documents.

Solution Integrator

The person responsible for fine-tuning Kofax Transformation Modules to the specific documents being processed. The options configured by the solution integrator determine how documents are classified and extracted, and also affect the options available in the user interactive modules.

Specific Learning

A learn-by-example technology which uses a knowledge base to extract information from invoice documents from known suppliers. Once a few samples from a supplier have been trained, all invoices from that supplier can then be extracted with high confidence.

Specific Online Learning

Specific learning performed on-the-fly without the need for administrator intervention. Keyboard operators identify documents where extraction was not successful, and they are automatically processed by the Knowledge Base Learning Server, which maintains a dynamic specific knowledge base.
<table>
<thead>
<tr>
<th><strong>T</strong></th>
<th>Training Set</th>
<th>A group of documents used to configure a project to improve classification and extraction results. From a training set you can create a knowledge base to be reused for other projects.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>U</strong></td>
<td>Unconfident</td>
<td>A class, field, or character with a confidence value below the threshold for it to be considered valid. Unconfident classes, fields, and characters require user attention.</td>
</tr>
<tr>
<td><strong>V</strong></td>
<td>Validation</td>
<td>Reviews extraction results for an entire document and ensures that all information is valid. Documents can also be marked for online learning. Additional validation steps can be used to review a subset of extraction results in configurations where validation is performed in multiple steps.</td>
</tr>
<tr>
<td></td>
<td>Verification</td>
<td>Verification allows comprehensive verification of critical data fields using a keyboard-optimized interface. Verification is processed on documents that have passed the final validation step. Following modes can be configured for the verification: confirmation (by pressing a single key to accept the data), blind double keying (a more comprehensive verification technique) and reviewing the fields in a read-only state.</td>
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