

# eFLOW Validate

## User Guide

Version 5.2

Copyright © TIS, Top Image Systems. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, translated, transcribed or transmitted in any form, or by any means manual, electric, electronic, electromagnetic, mechanical, chemical, optical, or otherwise, without the prior explicit written permission of TIS.

# Contents

<b>Validate</b> .....	<b>4</b>
Open Validate .....	4
Layouts .....	6
Editing modes .....	6
Form mode .....	6
Group mode .....	6
Tiled group mode .....	8
Tiled rejected group mode .....	8
Collections .....	8
Navigation shortcuts .....	9
Forms navigation .....	10
Organize forms .....	10
Set attachment pages .....	11
Move pages .....	11
Split a form .....	11
Merge forms .....	11
Image viewer .....	11
Tables .....	12
Lookup tables .....	13
Capture values from the image .....	13
Exceptions .....	13
Shortcut editor .....	14

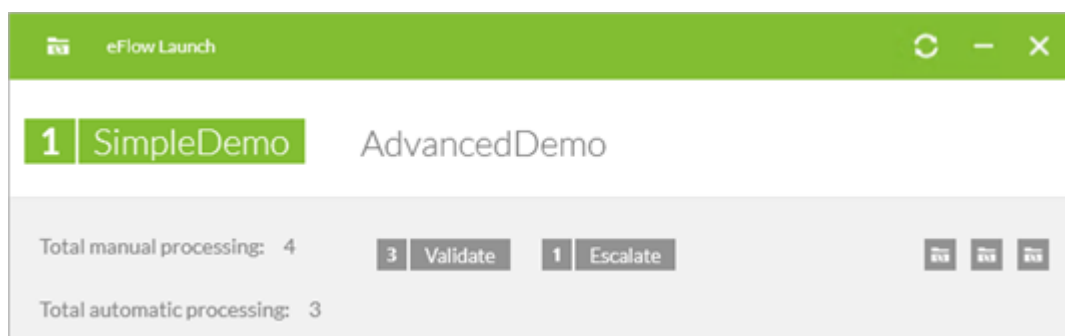
# Validate

In the eFLOW Validate station, you can correct and complete fields that were not correctly recognized or that did not pass validations in the Recognize station.


**Note:** eFLOW Validate is customizable. Depending on your system configuration, some features described in this guide may not be available, or may be different than described.

## Open Validate

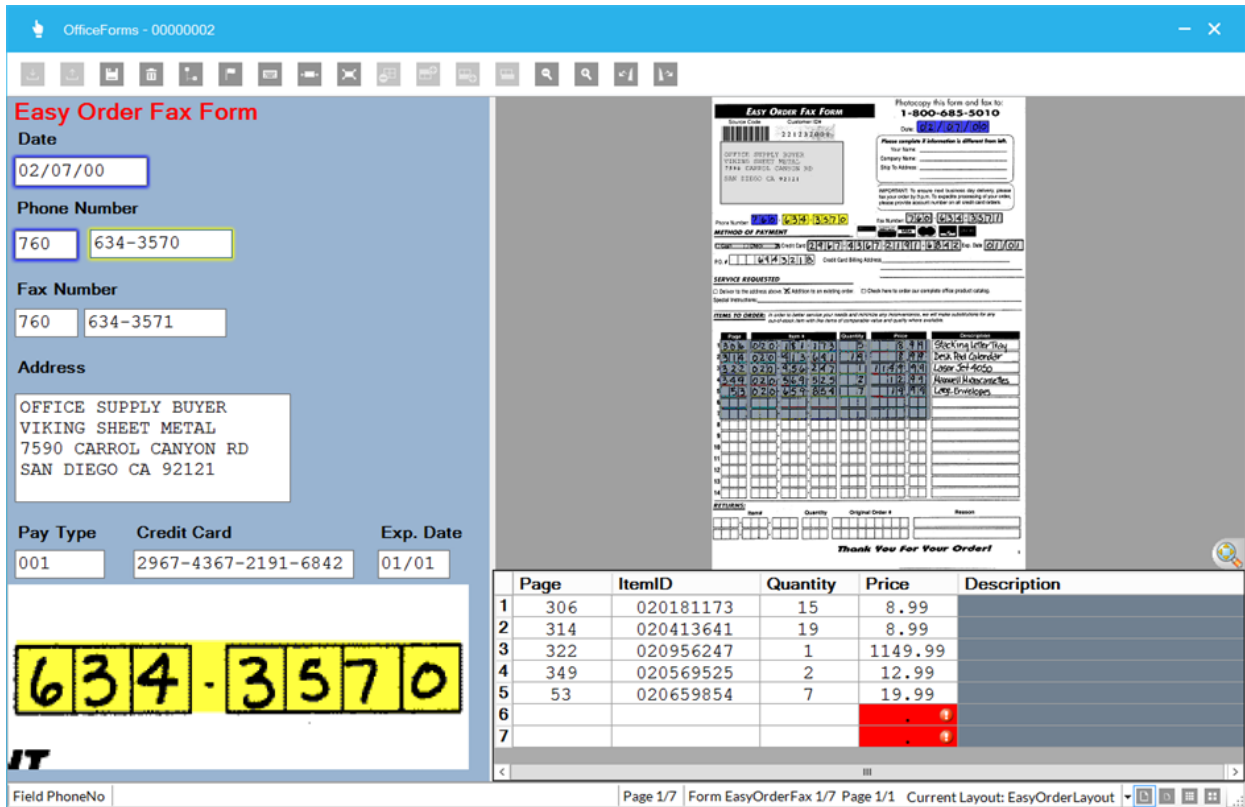
In eFLOW Launch, select your eFLOW application, then click the **Validate** button.



The **Validate** window opens. Usually, collections load automatically and the fields and image are displayed.

If collections do not automatically load, click the **Get Batch**  button.

You can now [navigate](#) to fields that need correction and type in the values, transfer them from [lookup tables](#) or [capture](#) them from the image.



Fields and values on the image are highlighted:

Color	Screen area	Meaning
Blue	Field layout and image	Recognized fields.
Yellow	Field layout and image	Currently selected field.
Red	Field layout	Invalid mandatory field. You must correct invalid fields before you can move to the next field or form. If you cannot correct the value for some reason, set an <a href="#">exception</a> .

## Layouts





The layout of the fields depends on the configuration.

The name of the current layout is displayed at the bottom right of the screen. To select a different layout (if available), click the arrow and select the layout from the list.

Current Layout: EasyOrderLayout ▼

## Editing modes

Validate provides the following editing modes. Click one of the buttons at the bottom right of the screen to select a mode:

Button	Mode
	Form mode
	Group mode
	Tiled group mode
	Tiled rejected group mode

### Form mode

In **Form** mode, you process one form at a time. After you have processed all fields of one form, you move on to the next form.

### Group mode

In **Group** mode, you process one group of fields at a time. Field groups are defined in the Validate station configuration. A group usually contains fields with related information. For example, the group **Phone details** might include the fields **Area code** and **Phone number**, or the group **Credit card details** might include the fields **Credit card number** and **Expiry date**.

After you have processed all fields of a group on one form, you move to the same group of fields on the next form.

When you have processed all fields of one group on all forms, you move to the next field group.

For example, you process the phone details on the first form:

Phone Number: 760 - 634-3570

**METHOD OF PAYMENT**

Phone No 760 - 634-3570

You then move to the phone details of the second form:

Phone Number: 760 - 736-8400

**METHOD OF PAYMENT**

Phone No 760 - 736-8\_00

After processing the phone details of all forms in the collection, you move to the credit card details group.

**METHOD OF PAYMENT**

Cash  Check  Credit Card 2967-4367-2191-6842 Exp. Date 01/01

P.O. # 6943218 Credit Card Billing Address: \_\_\_\_\_

**SERVICE REQUESTED**

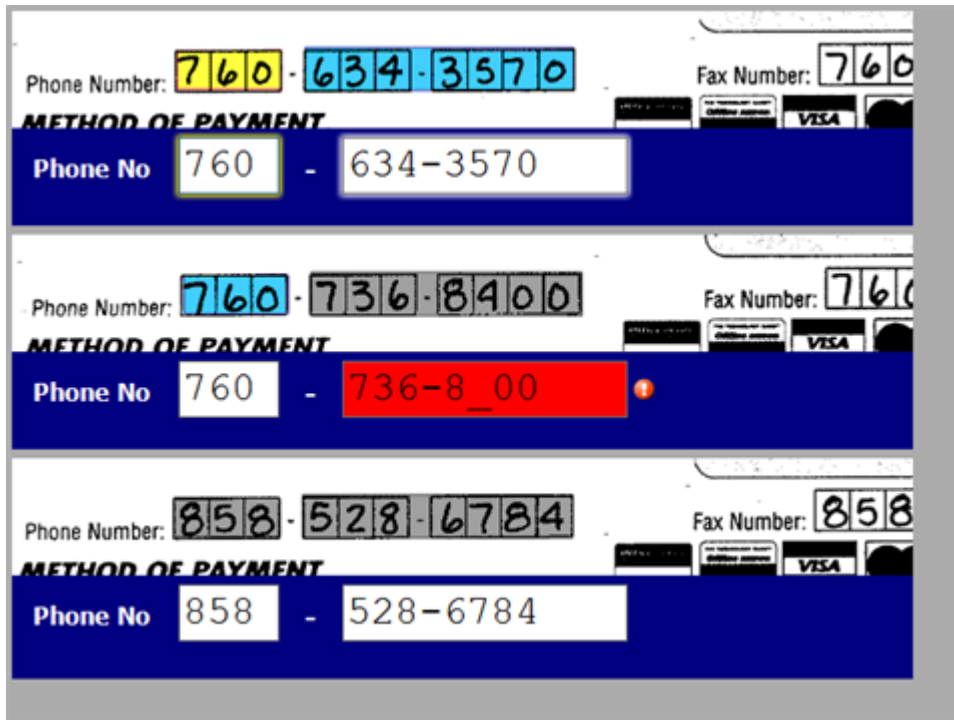
Deliver to the address above.  Addition to an existing order.  Check here to order our complete office product catalog.

Special Instructions: \_\_\_\_\_

Credit Card 2967-4367-2191-6842 Exp Date 01/01

## Tiled group mode

In **Tiled group** mode, the field groups of several forms are displayed in tiles on the same screen.





## Tiled rejected group mode






**Tiled rejected group** mode is similar to **Tiled group** mode, but it displays only groups that contain invalid fields.

## Collections

Use the following buttons or shortcut keys to work with collections.

Command	Button	Shortcut	Description
Get Batch		F6	Retrieves available collections from the server. The number of collections retrieved in one batch is defined in the Validate station configuration. Available only when no batch is currently loaded.
Put Batch		F7	Writes the collections back to the server after work on the collections is completed. Available only when all fields in the collection are valid.




Command	Button	Shortcut	Description
Save Batch		CTRL+B	Saves the collections without writing them back to the server.
Discard Batch		CTRL+ALT+D	Discards the collections without saving any changes.
Forms Navigation		F12	Displays the <b>Forms navigation</b> window with thumbnails of all pages of all forms. Click a thumbnail to display a specific page.
Exceptions		ALT+E	Opens the <b>Exceptions list</b> dialog box. See <a href="#">Exceptions</a> .
Shortcut Editor		F1	Opens the <a href="#">Shortcut Editor</a> .

## Navigation shortcuts



Use the following shortcut keys to navigate between fields and forms.

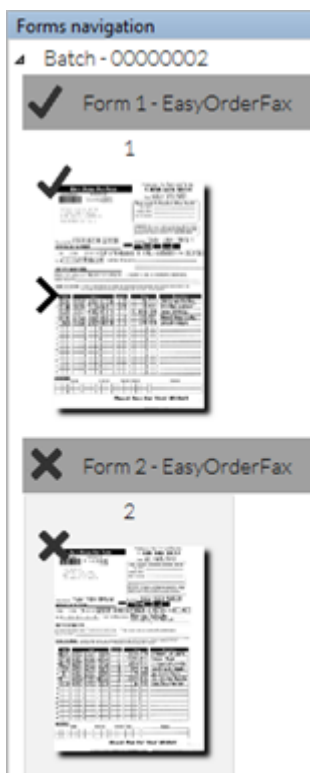
Go to	Shortcut	Description
Next field	TAB	The next or previous field is determined by the tab index order defined in the Layout Designer.
Previous field	SHIFT+TAB	
Next invalid field	ENTER	The next or previous invalid field is determined by the tab index order defined in the Layout Designer.  When there are no more invalid fields in the current form, the cursor moves to the next form that contains invalid fields, if such a form exists.
Previous invalid field	SHIFT+ENTER	
Next form	CTRL+PGDN	Available only when all fields of the current form are valid.
Previous form	CTRL+PGUP	

## Forms navigation

In the **Forms navigation** window, you can navigate between forms and their pages. Click the **Forms Navigation**  button or press F12 to open this window.

Each form page is displayed as a thumbnail. An arrow  indicates the form whose input fields are currently displayed in the layout window.

Forms and pages with invalid fields are marked with a cross . Forms and pages with no invalid fields are marked with a tick .



Click on a thumbnail to view the page in the image viewer.

**Note:** Clicking on a thumbnail simply displays the image of the selected page in the image viewer. It does not change the display in the layout window to show the input fields of the form to which the selected page belongs.

## Organize forms

In the **Forms navigation** window, you can organize forms and their pages. Click the **Forms Navigation**  button or press F12 to open this window.

**Note:** This functionality is configurable, so some features may not be available in your installation.

## Set attachment pages

You can mark pages of a form as attachments. You may want to do this, for example, if the page consists of information that does not need to be exported from eFLOW. Attachment pages are not validated by the system.

In the **Forms navigation** window, right-click on the page and select **Set as attachment**.

The page thumbnail and the page image is marked with a paper-clip icon.



## Move pages

You can move pages within forms and between forms.

Click on the page you want to move, hold down the left mouse button, drag the page to the new position, then release the mouse button.

## Split a form

You can split a form with multiple pages into two forms.

Right-click on the page that will become the first page of the new form and select **Split**.

A new form is inserted directly below the split form. The selected page and all following pages are moved to the new form. The forms are automatically renumbered.

## Merge forms



You can merge a form with the form that immediately follows it.





Right-click on a page of the first form and select **Merge**.

All pages of the second form are moved into the first form, and the second form is deleted. The forms are automatically renumbered.

## Image viewer





Use the following buttons or shortcut keys to work with images.

Command	Button	Shortcut	Description
Zoom In		CTRL +	Increases the image size.
Zoom Out		CTRL -	Decreases the image size.

Command	Button	Shortcut	Description
Fit Viewer to Window Width		F2	Adjusts the image viewer to show the full image width.
Fit Viewer to Window Size		F3	Adjusts the image viewer to show the entire image.
Rotate Left		CTRL+Q	Rotates the image counter-clockwise.
Rotate Right		CTRL+P	Rotates the image clockwise.

## Tables

Use the following buttons or shortcut keys to work with tables.

Command	Button	Shortcut	Description
Delete Row		CTRL+H	Deletes the current row.
Insert Row Above		CTRL+I	Inserts a new row above the current one.
Insert Row Below		CTRL+J	Inserts a new row below the current one.
Copy Row From Above		CTRL+K	Copies the row above the current one and inserts it as a new row.

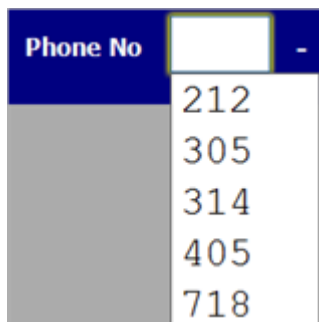
## Lookup tables

Lookup tables enable you to search for field values and transfer them to the fields.

Depending on the field configuration, lookup tables display automatically, or you open them manually by pressing a shortcut key. By default, the shortcut key for lookup tables is F9.

To use a lookup table:

1. Delete the existing field content.
2. Press the lookup table shortcut key.
3. Select a value from the list.



## Capture values from the image

You can capture a value on the image and transfer it directly to a field.

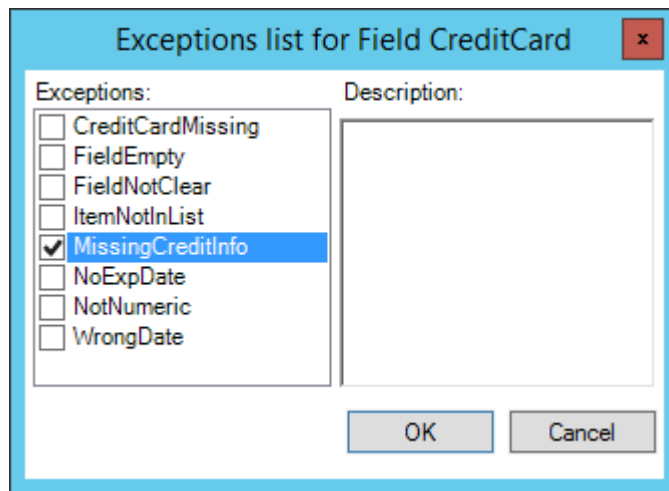
1. Click in the field.
2. Hold down the left mouse button and draw around the corresponding value in the image.

## Exceptions

If you are unable to complete a field or an entire form for some reason, you can mark it as an exception. Collections with exceptions move to the Escalate station, where they can be handled by other users.


1. Click the **Exceptions**  button.
2. In the **Exceptions List** dialog box, select an exception and enter a description of the problem (optional).

3. Click **OK**.



## Shortcut editor

You can edit the default shortcut keys.

1. Click the **Shortcut Editor**  button.
2. In the **Shortcut Editor** dialog box, select the shortcut you want to change.
3. Click in the **Press shortcut keys** field and press the key combination you want to use.

4. Click the **Assign** button.

