



Kofax eFlow

Validate User's Guide

Version: 6.1.0

Date: 2023-08-29

KOFAX

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Preface

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.

 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.

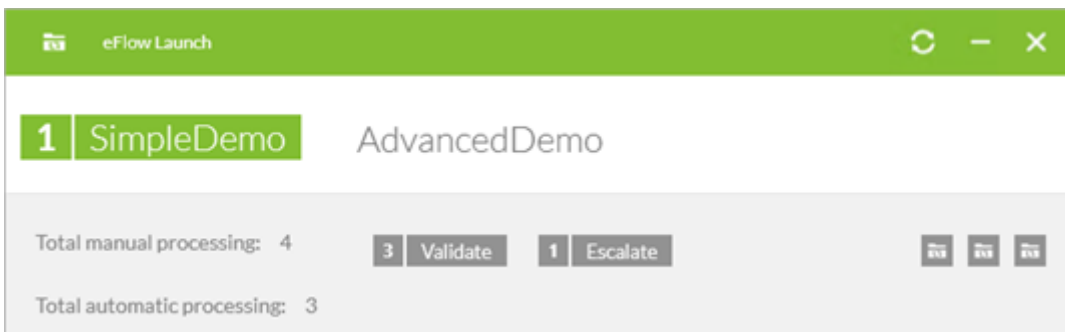
Product documentation


To access the full Kofax eFlow documentation set online, see the [Kofax eFlow Product Documentation page](#). For a complete set of Kofax eFlow documents, refer to the Kofax eFlow Release Notes.

Open Validate

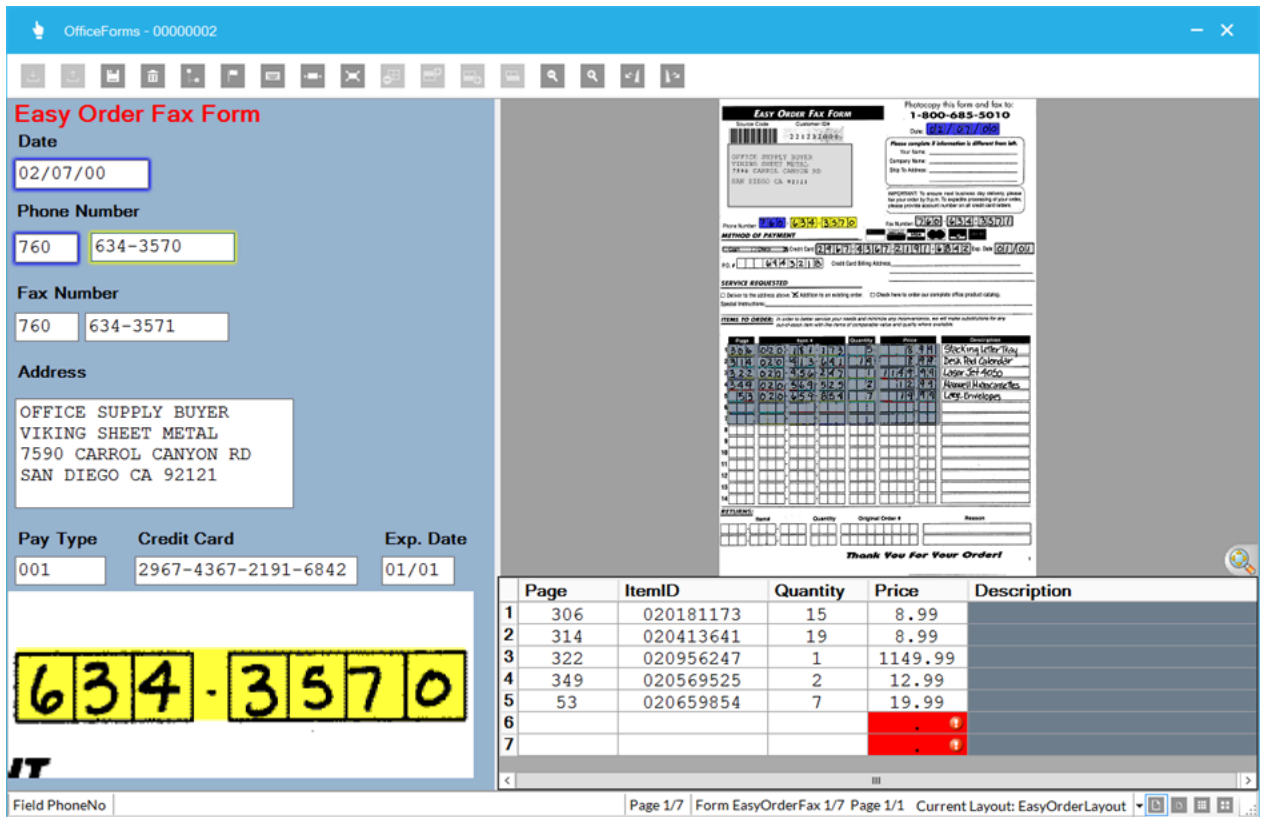
In **eFlow Launch**, select your eFlow application and click **Validate**. Or in the **eFlow Launch Pro** select your application from the **Applications** list, and then from the **Stations** list select **Validate**.

The **Validate** window opens.



Usually, collections are automatically loaded, and the fields and image are displayed. If collections do not load automatically, click **Get Batch** .

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 exception .

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

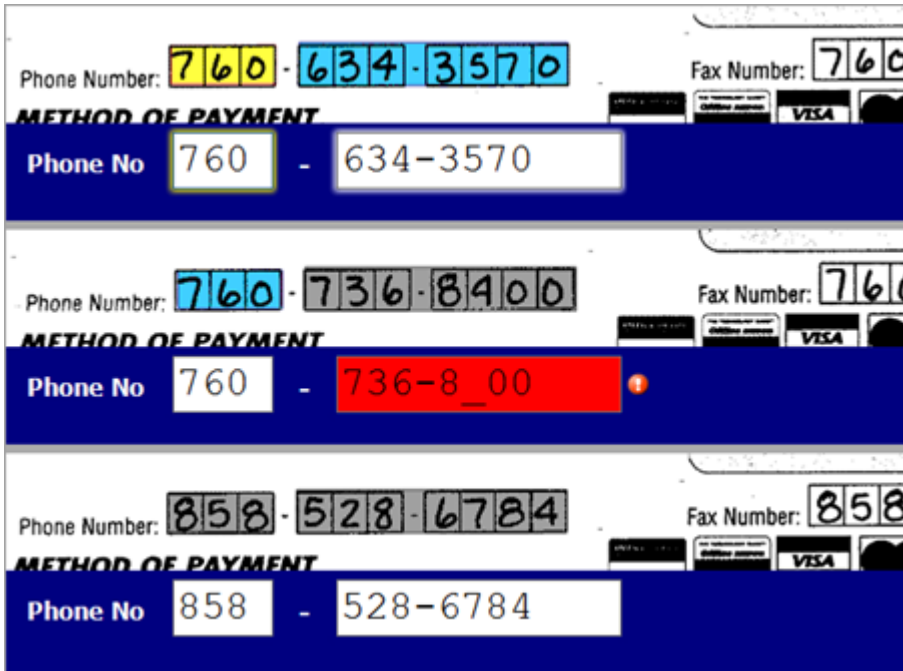
Deliver to the address above. Addition to an existing order. Check here to order our complete office product catalog.

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 like 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.
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 Forms navigation window with thumbnails of all pages of all forms. Click a thumbnail to display a specific page.
Exceptions		Alt+E	Opens the Exceptions list dialog box. See Exceptions .
Shortcut Editor		F1	Opens the Shortcut Editor .

Navigation shortcuts

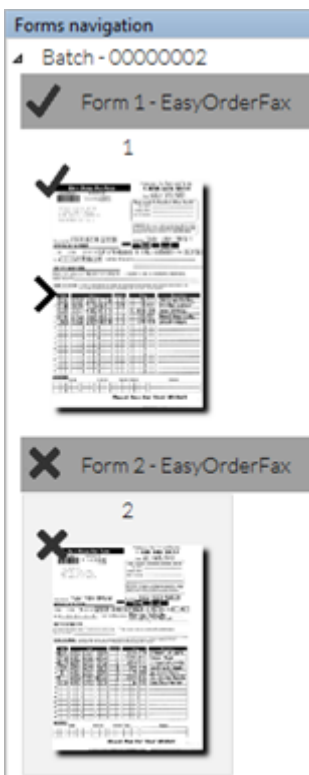
Use the following shortcut keys to navigate between fields and forms.




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	The next form is displayed.
Previous form	Ctrl+PgUp	The previous form is displayed.

Forms navigation


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

Each form page is displayed as a thumbnail.





Icon	Description
	The arrow indicates the form whose input fields are currently displayed in the layout window.
	Indicates forms and pages with invalid fields.
	Indicates forms and pages with no invalid fields.

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

 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 pane, you can organize forms and their pages. Click Forms Navigation  or press F12 to open this pane.

 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** pane, 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.
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

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.

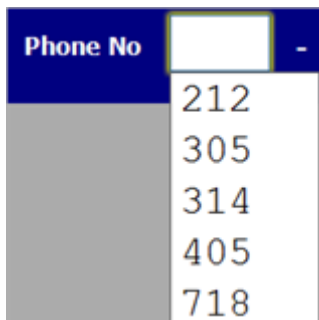
Lookup tables

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.



The image shows a screenshot of a software interface. At the top, there is a dark blue header bar with the text 'Phone No' in white. Below this header is a white input field containing a small blue square icon. To the right of the input field is a small blue square icon with a white minus sign. Below the input field, a list of five values is displayed: 212, 305, 314, 405, and 718. The list is presented in a white box with a thin border, and the background behind it is a light gray.

Phone No
212
305
314
405
718

Capture values from the image


 Capture values from the image is applicable where PageOCR is performed for recognition.

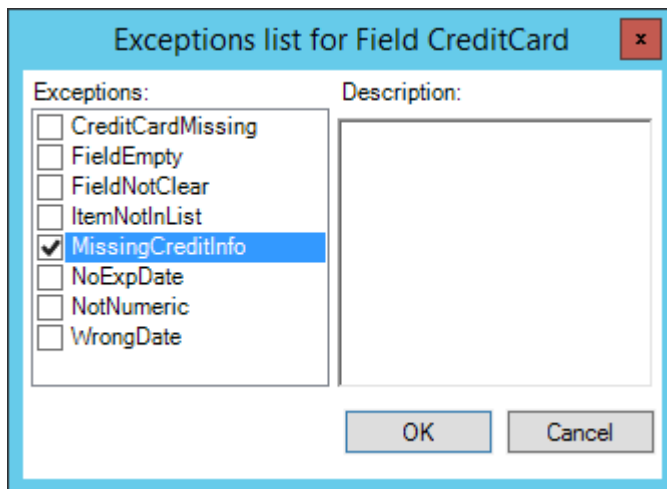
You can capture a value on the image and transfer it directly to a field.

1. Click in the field.
2. Hold down the left mouse button and draw a rectangle 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.

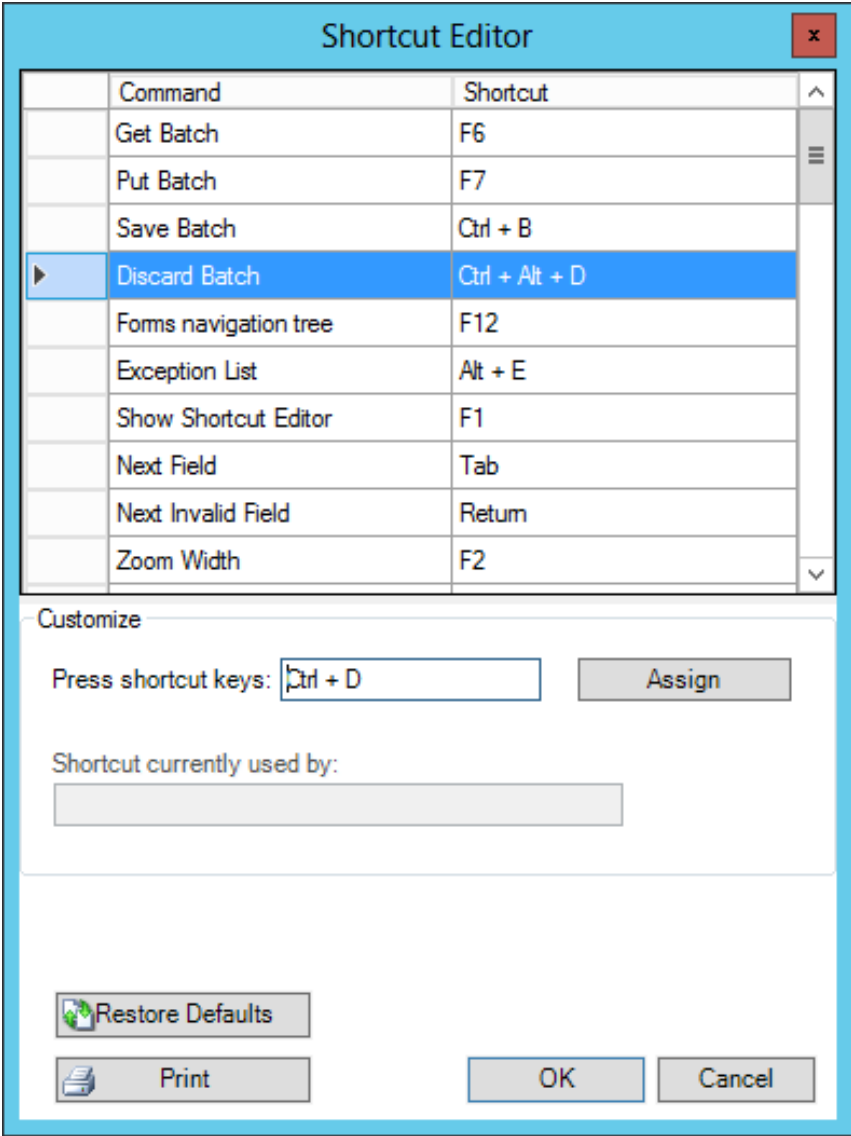
1. Click **Exceptions** . The **Exceptions List** dialog box for the selected field is displayed.
2. Select an exception.
3. Optional. Type description of the problem.
4. Click **OK**.



Shortcut editor

You can edit the default shortcut keys.

1. Click **Shortcut Editor** . The **Shortcut Editor** dialog box is displayed.
2. 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 **Assign**.