ABBYY FlexiCapture 8.0 Professional
Data Capture Operator's Guide
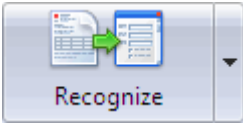
Overview

The typical data capture process involves the following four steps:

1. **Loading images** – At this step, document images are added to the project
2. **Recognition** – At this step, the data on the images are recognized
3. **Verification** – At this step, the recognized data are verified
4. **Export** – At this step, the verified results are saved

Each step has its own button on the toolbar:

Loading images The arrow to the rights selects how images will be obtained. You can **Load Images**, **Scan Images**, or **Import Images** using one of the available image import profiles. The caption of the button changes to reflect your choice.	Scan Images...
Recognition Starts the recognition process. Click the arrow to the right to select the **Analyze** or **Match Template** command.	Recognize
Verification Starts the verification process. Click the arrow to the right to select the **Re-check Rules** command.	Run Verification...
Export Export the data based on the template settings. Click the arrow to the right to select the **Export to File** or **Export to Database** command.	Export

Loading images

First, you must select a project:

1. Click [ ] and select the desired project.

2. Select a batch or create a new batch into which the images are to be loaded. To create a new batch, right-click anywhere in the main window and select **New Batch** on the shortcut menu. If you try adding images to a project that contains no batches, a new batch will be created automatically.

Now you must load the images into the batch. There are several ways of loading images:

1. You can load existing image files. To load existing images, click the arrow next to the **Import Images…** button and select **Load Images**... Alternatively, you can press the Ctrl+O keyboard shortcut.

2. You can scan paper documents. To scan paper documents, click the arrow next to the **Import** button and select **Scan Images**... The program will prompt you to select a scanner.

3. You can import images using one of the image import profiles that were earlier created by the administrator.

   If there are image import profiles available, their names will be displayed on the drop-down menu of the **Import** button. Select the desired profile to start importing images.

   Clicking **Import Images…** opens the **Select Import Profile** dialog box. Select the desired import profile and click **Import** to start importing images.

   Once you select an image import profile, its name will be displayed on the **Import Images…** button so that you don't have to select this profile from the list next time you want to use it.

Images may be imported in background mode if an appropriate import profile was created. Selecting this type of profile automatically loads images into the batch from a dedicated "hot" folder.

After you add the images, unprocessed pages appear in the list.

Recognition

Clicking the **Recognize**. Button starts the recognition process.

The recognition process may be launched automatically as soon as images are added into the batch. To enable this option, select **Tools**>**Options**, click the **Document Processing** tab, and check **Recognize added images automatically**.

The **Confidence Level** column displays the percentage of reliably recognized characters.

Once the recognition process is complete, you may verify the results.

Verification

Verification consists in checking the recognized data for errors.

For multi-page documents, you must first check if the pages have been correctly assembled into documents. Then the recognized data are verified using group and context verification modes. You can also verify the data in the document window. Rules are also checked at this stage.

1. Checking document assembly. This check is not required when processing one-page documents — you can go directly to data verification.

For multi-page documents, you must first check if the program has assembled the pages into documents correctly.

If the order of pages in a document does not match the order specified for this document or if the values of the key field are not identical on all the pages, the document is marked with a red flag and an error message is displayed in the document window.


Section Template 1
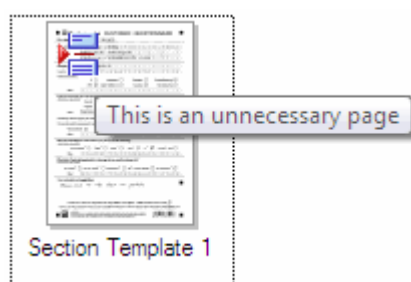
If this is the case, first make sure that pages were not mixed up at the scanning stage. Many assembly errors can be corrected by simply changing the order of pages.

You can check document assembly in thumbnail view (Figure 1). In this view, you can change the position of pages and even move them between documents with the mouse.

If key field values are used to ensure correct document assembly, the values of the key fields are displayed below the image of each page (Figure 1). If key field values are not identical on the pages of the same document, they will be displayed in red.

A mismatch of key field values may occur if they have been recognized or filled out incorrectly. Verify the key field values. If the mismatch persists, the mismatching pages are from different documents. Find the pages with identical key field values and assemble them into documents.

Note: To change the scale of the thumbnail images, hold down the CTRL key and scroll the mouse wheel.
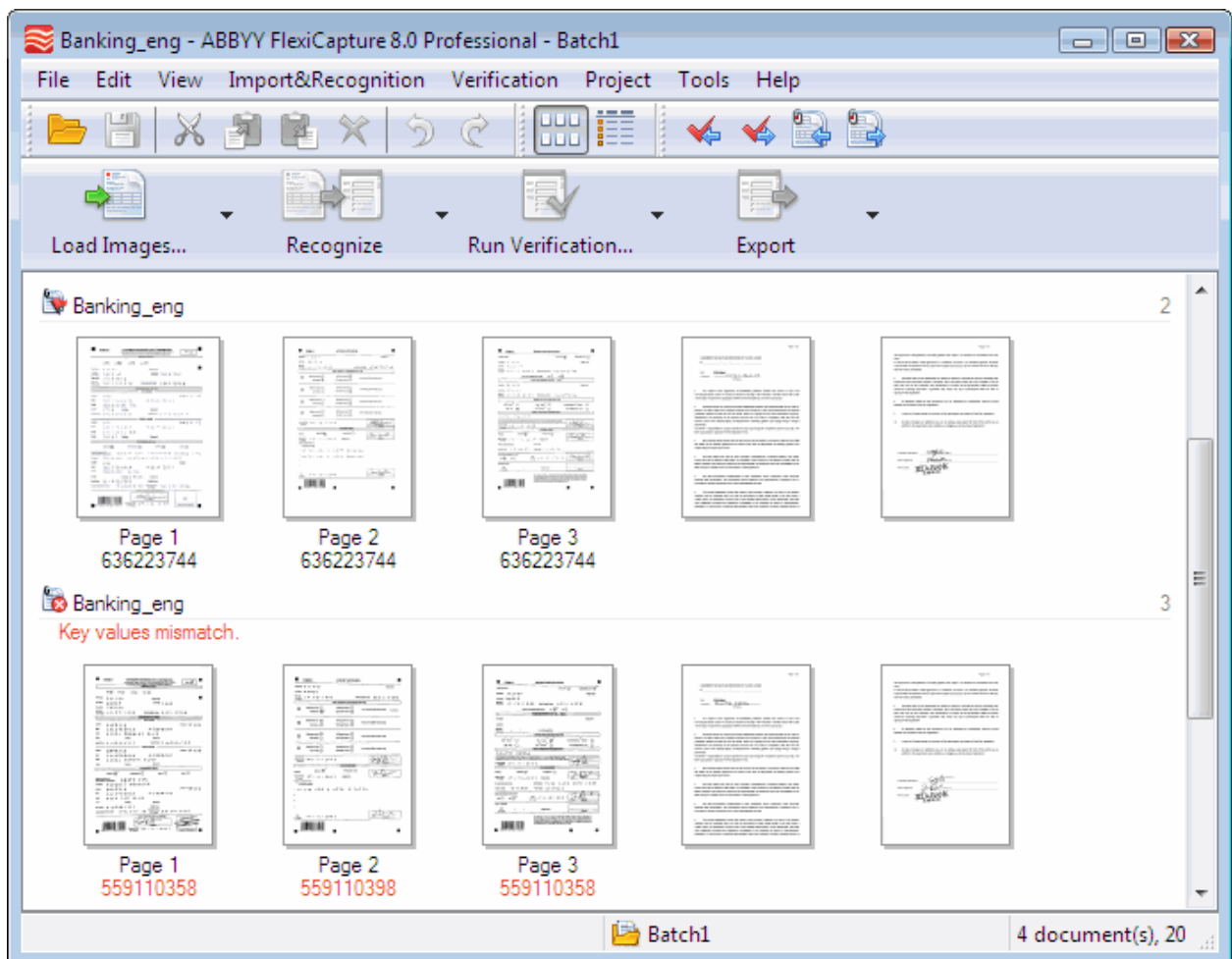
Figure 1. Document pages in thumbnail view

Next, start the verification process by clicking **Run Verification**. First, the group verification window opens. Once the group verification is finished, the context verification window opens.

2. Group verification groups together the images of characters that have been recognized identically. Identical characters (e.g. digits 1 in Figure 2) are shown in groups so that you can confirm the obviously correctly recognized characters and postpone the incorrect or dubious ones until the next verification stage.

If you have doubts about a character:

1. Right-click the character and select **Show Character Image** on the shortcut menu or press F2. The image of the field containing the character being verified will be displayed.

2. In the verification window, select **View > Field Image > Show Field Image** or press the Ctrl+I keyboard shortcut. The verification window will be split into two panes and the appropriate field will be displayed in the bottom pane when you rest the mouse cursor on a dubious character.

If a character has been recognized incorrectly:

1. Select the incorrect character and type its correct value. The value will be displayed in green in the left top corner of the character image.

2. If you are not sure if the character has been recognized correctly even after you have viewed it in context, click the character once to mark it with a red question mark. You can also click the **Toggle** button on the toolbar to change character status.

To confirm that a character has been recognized correctly, right-click the character and select **Confirm** on the shortcut menu. You can also confirm all the currently displayed characters by clicking **Confirm All** on the toolbar.
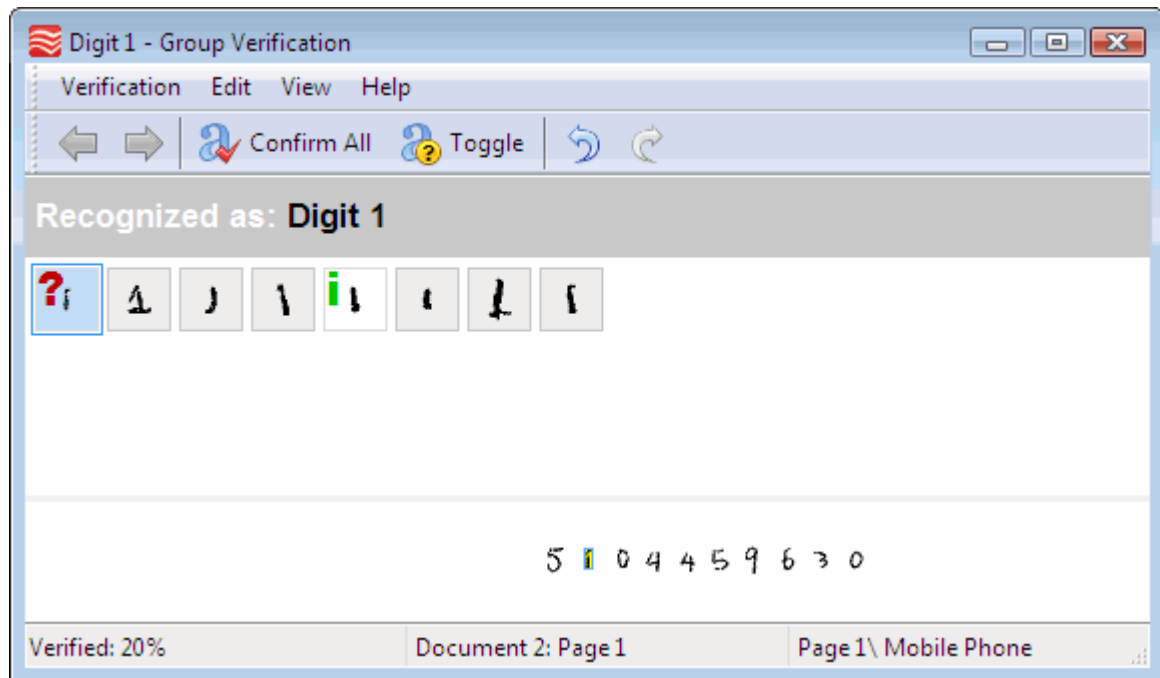
Figure 2. Group verification of digits

3. Context verification allows you to verify uncertainly recognized characters in the context of their fields, whose possible range of values is known in advance. For example, you may know which countries are possible in the **Country** field, and can easily correct any errors in this field.

To correct recognition errors, you can use the standard insert and overwrite modes commonly provided by text editing software. Press the **Insert** button on the keyboard to switch between the modes.

View the recognition results for each field and either correct or confirm them by pressing **Enter** or clicking **Confirm Field** on the toolbar.

The fields whose values do not correspond to their pre-defined data type, are marked with a red flag and an error message is displayed for them. Likewise, the program will flag the fields whose values do not satisfy the rules that were specified for them. You must either correct the values in these fields or postpone the fields until a later stage by clicking the **Postpone** button.

Figure 3. Context verification window

4. The document window also allows you to check and correct recognized characters (Figure 4). To open the document window, double-click the name of a page. The document window displays the data, the image of the page, and rule errors (if any). Click the **Layout** button to change the window layout.

In the data section, uncertain characters are displayed in red and fields with invalid data types and failed rules are highlighted. Use the ![prev] and ![next] buttons to go to the previous/next error. These buttons consecutively go through assembly errors, uncertain characters, rule errors, etc.
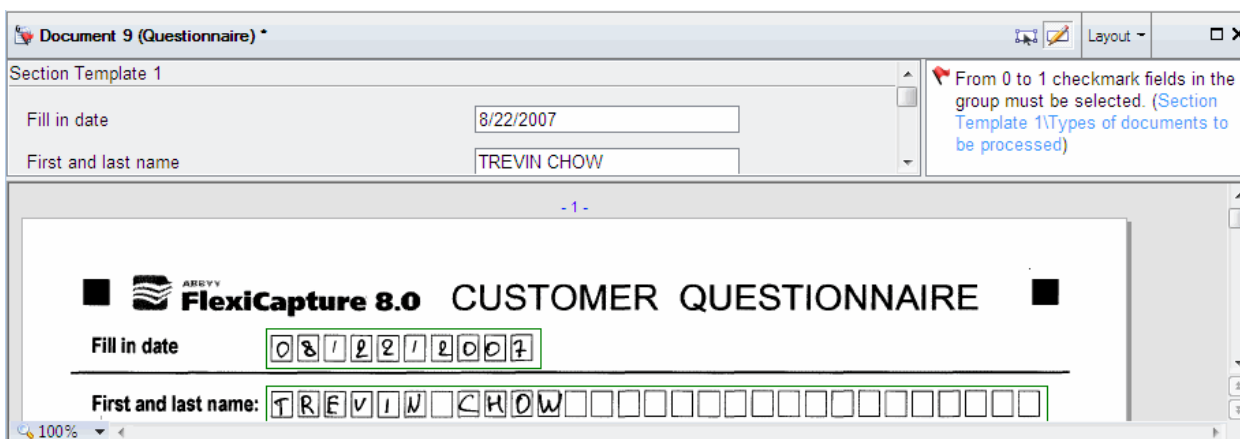
Figure 4. Document window

5. Rule validation. Rules that have not been met are marked with flags: yellow flags are used for warnings and red flags are used for serious errors.

If there are rule errors, check if the relevant data have been recognized correctly. If a field has been recognized incorrectly, correct the error. If a field has been filled out incorrectly and the error cannot be corrected right away, do not export the document.

To check the rules again, click the arrow to the right of the **Run Verification** button and select **Re-check Rules**. If the data have been corrected and the rules are satisfied, the flags will be removed.

Export

Once you have verified the recognized data, click the **Export** button to export them. The data will be exported based on the document template settings.

Instead of using the template settings, you can export the data to a file or database by selecting the corresponding item from the drop-down menu to the right of the **Export** button and specifying the desired export settings.
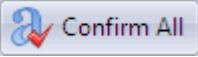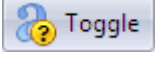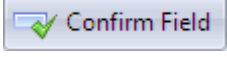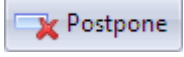
Appendix

The buttons on the standard toolbar in the main window

Name	Button	Description
Open Project		Opens another project
Save Changes		Saves changes
Cut		Cuts a selected object when you work with data in the document window
Copy		Copies a selected object
Paste		Pastes a previously copied object from the clipboard
Delete		Deletes a highlighted object
Undo		Undoes the previous action
Redo		Redoes a previously undone action
Thumbnails View		Shows document page images as thumbnails
Details View		Shows documents and their pages as a detailed list
Previous Item to Verify		Returns to the previous item to verify. The program navigates all errors, including assembly errors, uncertainly recognized characters, rule errors, mismatches of key fields, etc.
Next Item to Verify		Moves forward to the next item to verify. The program navigates all errors, including assembly errors, uncertainly recognized characters, rule errors, mismatches of key fields, etc.
Previous Document		Returns to the previous document
Next Document		Moves forward to the next document

The buttons on the toolbar in the group verification window

Name	Button	Description
Previous Page		Takes you to the previous page if all characters do not fit on a single screen
Next Page		Takes you to the next page if all characters do not fit on a single screen
Confirm Screen	Confirm All	Confirms correct recognition of all characters and takes you to the next screen.
Change Characters State	Toggle	Changes character status to rejected or confirmed
Undo		Undoes the previous action
Redo		Redoes a previously undone action

The buttons on the toolbar of the context verification window

Name	Button	Description
Previous Field		Returns to the previous field
Next Field		Goes to the next field
Confirm/Skip Field	Confirm Field	Confirms correct recognition of all characters in a field and takes you to the next field. If the field value does not fit the field format, the button name changes to Skip Field. If the field value cannot be corrected, its verification can be deferred or skipped.
Postpone	Postpone	Postpones field verification if its value cannot be corrected
Previous Uncertain Character		Returns to the previous uncertainly recognized character
Next Uncertain Character		Goes to the next uncertainly recognized character
Undo		Undoes the previous action
Redo		Redoes a previously undone action

Hot keys in the group verification window

Menu	Command	Hot Keys
Verification	Confirm All	Enter
	Postpone All	Ctrl+Enter
	Toggle	Space
	Next Page	Page Down
	Previous Page	Page Up
View	Field Image > Show Field Image	Ctrl+I
	Field Image > On Top	Alt+1
	Field Image > On Bottom	Alt+2
Symbols Menu	Show Character Image	F2
	Confirm	Ctrl+E
	Postpone	Ctrl+R
	Reset	Esc

Hot keys in the field verification window

Menu	Command	Hot Keys
Verification	Confirm Field	Enter
	Postpone	Ctrl+Enter
	Next Uncertain Character	F4
	Previous Uncertain Character	Shift+F4
	Next Field	Page Down
	Previous Field	Page Up
Edit	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V
	Delete	Del
	Insert Line Break	Shift+Enter
	Merge Characters	Ctrl+M
View	Field Data > Recognized Text	Alt+F1
	Field Data > Character Images Cutting	Alt+F2
	Field Image > Show Field Image	Ctrl+I
	Field Image > On Top	Alt+1
	Field Image > On Bottom	Alt+2
	Show Character Image	F2

Hot keys for both verification windows

Command	Hot Keys
Zoom into a field	Ctrl+Num+
Zoom out of a field	Ctrl+Num-
Undo	Ctrl+Z
Redo	Ctrl+Y
Select All	Ctrl+A
Full Screen	F11
Display Help	F1
Close	Alt+F4