

Oracle® Fusion Middleware

WebCenter Forms Recognition Web
Verifier User's Guide

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Provides information about how to use
WebCenter Forms Recognition Web Verifier

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Table of Contents

About Web Verifier	5
About WebCenter Forms Recognition Workflow	5
Explanation of Terms	5
Helpful Terms	6
<i>Items</i>	6
<i>Processes</i>	8
About Logging on to Web Verifier	8
Log On to Web Verifier	9
About Windows Authentication	9
<i>Logging on Using Windows Authentication</i>	9
Login Issues	10
Changing your Login Password	10
About Configuring Web Verifier	10
About Groups	11
About Roles	11
Specifying the General Settings	11
About Workflow	12
<i>Specifying the Workflow Settings</i>	12
<i>Specifying the General Settings</i>	13
About Exception Handling	14
<i>Defining Exception States</i>	14
Configuring Supervised Learning	15
About Batch Filtering	16
<i>Configuring Batch Filter Conditions</i>	16
Working with the Batch List	16
Batch View Icons	17
Batch View Columns	17
Batch View Toolbar Buttons	18
About the Document View	19
Working with the Document View	19
Splitting or Appending a Document	19
Main Toolbar Buttons	20

Viewer Toolbar Buttons	21
Document View Keyboard Shortcuts	21
Working with the Verification View.....	22
About the Classification and Indexing Results.....	23
About the Indexing Window	23
<i>The Document Pane.....</i>	23
<i>The Input Pane.....</i>	23
Correcting Classification Results	23
Reclassifying a Document Manually	24
About Processing Documents with an Obsolete Class.....	24
About Manually Correcting Extraction Results.....	24
<i>Form Elements and Field Types.....</i>	24
<i>Correcting Invalid Results</i>	25
<i>About Fields.....</i>	27
<i>Using a Word that is a Candidate for a Field.....</i>	27
<i>Using a Word That is not a Candidate for a Field.....</i>	28
<i>Inserting Blocks of Text.....</i>	28
<i>Finishing the Validation.....</i>	28
About Manual Indexing	28
About Working with Tables	29
<i>Table extraction and correction.....</i>	30
About Manually Correcting the Automatic Document Separation	34
<i>Checking Entire Batches.....</i>	36
<i>Classification Window Keyboard Shortcuts.....</i>	37
<i>Classification Window Toolbar Buttons.....</i>	38
<i>Indexing Window Keyboard Shortcuts.....</i>	40
<i>Indexing Window Toolbar Buttons.....</i>	41
Printing a Document.....	43
Printing Verified Data Content.....	43

About Web Verifier

Web Verifier is a web-based extension of the Verifier Client.

This application allows users to verify documents without having software installed on the client side.

The processing of activities primarily occurs on a central server allowing use of thin client devices running only a web browser.

About WebCenter Forms Recognition Workflow

In WebCenter Forms Recognition, the flow of incoming documents follows a sequence of standard processing steps. One of the objectives of WebCenter Forms Recognition is to get documents to their recipients as quickly as possible.

Runtime Server executes automatic steps that include document import with batch creation, OCR and layout analysis, classification, extraction, export, and clean-up. After the automatic steps there are two manual verification steps for quality control.

If Runtime Server detects that the batch contains invalid results, the user manually analyzes and resolves the problem. Invalid batches appear in a task list called Batch View. When WebCenter Forms Recognition finishes processing a batch, the documents are sent to their recipients.

Explanation of Terms

To properly ensure the quality of automatically processed documents, it is important to understand the following information.

Batches are the basic entity.

WebCenter Forms Recognition works on batches and will completely process one batch before processing the next. Verifying and approving entire batches before routing to subsequent systems is an important step since batches are the basic entity.

A batch is only valid if all of its parts are valid.

Since WebCenter Forms Recognition deals with information and data, the application uses the terms “valid” or “invalid” instead of “working” or “damaged.” The restrictions on the number of parts and the well-defined relationships makes it easy to understand why a batch is invalid.

A batch is invalid if:

One or more folders inside the batch are invalid.

A folder is invalid if:

One or more documents inside the folder are invalid.

A document is invalid if:

The automatic classification result is incorrect or if the automatic extraction result has invalid fields.

A classification result is invalid if:

The class still needs validating or the matching class was not found.

A field is invalid if:

The field content still needs validating, the field content does not comply with the validation rules, or filling-in the field is simply unfeasible.

Reasons for violating field validation rules.

- Restrictions on the number of characters.
- Allows only uppercase characters.
- Checking the questionable results from the OCR process, which are red and underlined.

Helpful Terms

Items

Accumulated Learnset

A common learnset is known as Accumulated Learnset.

Automatic Supervised Learning

This process uses the Associated Search Engine to process, classify, and extract information.

Base class

The highest level of a classification.

Batch

A batch is a stack of electronic documents. The electronic documents may be paper-based or files created using applications.

WebCenter Forms Recognition Table Extraction

An extraction method that facilitates interactive table training.

Candidate

Set of possible values for a field.

Child class

A class spawned by a parent class. Also called a sub-class.

Class

A set of documents that are grouped by common content. Each class usually has a mnemonic name that describes its contents.

Common Learnset

An accumulation of Local Learnsets.

DocClass

A parent document class.

Document

Any electronic file mainly consisting of ASCII text. If this is initially the case, OCR or filtering must be

applied to create the text representation classified, have fields used for extraction, and have one or more images attached.

Export

The system no longer manages documents released by the export function.

Folder

A logical structure inside a batch for coherent documents. For example, a folder may consist of all pages of a correspondence with many folders inside one batch.

Global Learnset

A general learnset that encompasses similar classes or projects. See also Local Learnset.

Learning

Given a view with a set of documents in vector representation and their class assignment, a neural network is created, so that the defined classes can be reproduced without error. This neural network is the used in all subsequent classification tasks.

Learnset

In classification, a learnset is a set of documents whose class assignments are specified by the user. For each view and each class, the user must provide a sufficient number of representative documents. Similarly, in extraction, a learnset is a set of documents whose field contents are selected by the user from a set of candidates.

Local Learnset

A learnset specific to a document class.

Neural network

An artificial neural network is an application that in some ways works like a human brain. This includes the ability to learn. It consists of artificial neurons that are linked into a network of layers. The neural network can receive signals through an input layer, process it within the internal layers, and send signals through the output layer. During learning, a specified input (called a teacher signal, such as documents from a Learnset) and the desired output (such as the corresponding classes) are presented to the network together. Processing is then adjusted until the desired output can be produced from the teacher signal.

Optical Character Recognition (OCR)

The reading and recognition of symbols of text from a piece of paper or a scanned image. OCR detects the symbols and converts them into characters and words that can be read electronically.

Parent class

A class with derived class, called children.

Project

A collection of customer settings for applications. Projects are created in Verifier and sent to Runtime Server for productive operation.

Smart Indexing

Smart indexing uses a database lookup to determine document attributes. It can be used for automatic indexing and to support manual indexing.

Sub-class

A derivative class. Also called a child class.

Workdoc

An internal structure representing the logical structure of a document. The Workdoc represents the data created during processing of a single document and contains all OCR and analysis results.

Processes

Analysis

Analysis means the document content is analyzed and a set of possible values for a field are generated called candidates.

Classification

Classification means assigning one or more classes and corresponding confidence values to one or more unknown documents.

Evaluation

Evaluation means determining a class or the contents of a field from confidence levels, weights, or distances for classes or candidates.

Extraction

Extraction means automatic document indexing and its information that helps to sort, file and search documents.

Importing

Importing means bringing documents into the system for management and processing.

Indexing

Indexing means assigning attributes to a document. This can either be done manually, semi-automatically (Smart Indexing), or entirely automatically (Extraction).

Validation

Validation involves confirming whether a processing result is correct.

Verification

Verification is related to quality assurance. It involves taking a processed document, checking the processing results, and correcting any errors.

About Logging on to Web Verifier

Launch Web Verifier from a web browser using the server or application address.

When starting Web Verifier on a machine for the first time, not all controls may be displayed. In this case, add the Web Verifier site to the trusted sites list of your browser.

The project administrator assigns a user a name and password for Web Verifier. The user name and password also set the user rights for the active session.

Log On to Web Verifier

To log on to Web Verifier, complete the following steps.

1. Open the login page of **Web Verifier** from a web browser.
Note: The project administrator configures the login for Web Verifier by using either the Web Verifier login or Windows authentication.
2. In the login dialog box, in the **User Name** field, type your user name.
3. In the **Password** field, type your password.
4. Click **Log In**.

The name of the current user displays at the upper right corner of the Web Verifier window.

About Windows Authentication

Your administrator needs to configure the Web Verifier service to allow Windows authentication.

The Windows authentication login for Web Verifier shows the following special behavior.

- A canceled or failed authentication opens an error page. Press the reload button to open the Login window again.
- You can switch to another user, such as the Administrator, by opening the File menu and clicking Re-login. The standard Web Verifier Login window opens.
- Windows authentication mode prevents changing your password.
- The Logout link terminates the session on the server. Reloading a Web Verifier page in the same browser instance creates a new session on the server for the current user.
- In order to completely logout from the system, it is necessary to close all open browser sessions. Otherwise, returning to the starting page automatically restores the last session. A message screen at the end of the logout step reminds you of this:

Thank you for using Web Verifier. To complete the logout, you may now exit all opened browser windows.

Logging on Using Windows Authentication

To log on using Windows authentication, complete the following steps.

1. Open the **Web Verifier** start page.
2. Complete your Windows credentials.
3. When logged in, the **Web Verifier** window shows the domain and computer name in the top-right corner.

Note: The Windows authentication form will not display if the current user is not configured for Web Verifier Windows authentication by the project administrator.

Troubleshooting

Issue: If a user works with more than one active session, it might happen that the first session expires while the user is, for example, validating a batch in another session.

In this case, an error message such as "Object reference not set to an instance of an object", might be displayed.

Resolution: Return to the batch list and open the required batch again.

Issue: Web Verifier is not working as expected after being setup.

This could happen after Web Verifier has been setup and later it is not working. Web Verifier has a dependency on the WFR Core Service and WFR Runtime Server Service.

Resolution: Make sure the WFR Core Service and WFR Runtime Server Service are up and running.

Login Issues

This topic covers issues that you may encounter at login.

Maximum number of users exceeded

There is a maximum number of users allowed to access the WebCenter Forms Recognition database at one time, which depends on the licenses.

Session timeout

To maintain the workflow with several Verifier users, a Web Verifier session ends automatically after 20 minutes of no activity.

Changing your Login Password

To change your password, complete the following steps. The change password option is not available for users logged in with Windows authentication.

1. From the **Options** menu, select **Change Password**.
2. In the **Old Password** field, enter your current password.
3. In the **New Password** field, enter the new password.

Note: The minimum character length for a password is 7, the maximum character length is 20. The password must include both alphanumeric and numeric characters.

4. In the **Confirm New Password** field, reenter the new password for verification.
5. Click **OK**.

About Configuring Web Verifier

Configuring Web Verifier requires specifying which batches of documents are processed at a given station.

This includes:

- The Designer project file that contains the settings used to process the documents.
- The name of the job that contains the batches to verify.
- The processing steps that you want to perform: classification, extraction, document separation, or all of them.

- The status of batches before and after processing.

You can only work with Web Verifier after these settings are established. Only experienced users should change the settings.

Administrators assign users to groups that have specific roles. Depending on the group, the following settings are possible.

About Groups

Administrators assign users to groups that have specific roles. Depending on the group, the following settings are possible.

Administrator

For a default Administrator user with all of the available roles assigned, the Settings window displays all possible options.

SLM and SLV roles

Learnset Manager users with the Supervised Learning Manager and Supervised Learning Verifier roles, but without the Administrator role are presented without the Group Settings. The Supervised Learning tab is available.

Verifier user

For a default Verifier user, with the VER (Verifier), SET (Verifier Settings), and FLT (Filtering) roles assigned. Only the basic settings are available. Usually, the Administrator has already configured the Group settings with the project selected. Clicking the Default button adopts all settings for your group. The fields in all available tabs populate automatically.

No Supervised Learning tab is available, and you are not able to edit Group Settings.

If you want to configure your own settings, find the descriptions for the single configuration options as indicated in the following topics.

About Roles

Depending on their assigned role, users are able to complete the following tasks.

- Define, modify, and maintain the learnset.
- Collect and manage local training data.
- Propose learnset candidates to improve the performance.
- Verify the documents that Runtime Server could not automatically process.
- Access and change the batch filtering properties.
- Access and change the settings.

For more information, see "Users, groups, and roles" in the *Oracle WebCenter Forms Recognition Designer Guide*.

Specifying the General Settings

To specify the General settings, complete the following steps.

1. On the **Options** menu, click **Settings**.
2. Optional. As an administrator, you can configure settings for different groups. Select **Group Settings**

and then select a group from the list.

Note: Other users configure their own settings by selecting **My Settings**. For more information, see ["About Groups" on the previous page](#).

3. The project file contains the forms used to verify the extraction. To define the project that processes the documents, complete one of the following substeps.
 - To select a project file from the list, select **Use project file** and then select the required project from the **Project** list.

The project loads after saving and returning to the **Batch View**.

- To specify a project referenced in the batch control file, select **Use batch specific project file**.

The project loads each time you open a batch and each time a batch opens for a different project.

4. From the **Job** list, select the name of the job for which you want to process the documents.
5. To select another language, from the **Application Language** list, select the required language.
Web Verifier supports Chinese Simplified or Chinese Traditional, Danish, Dutch, English, French, Finnish, German, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Romanian, Russian, Spanish, Swedish, and Turkish.
6. Optional. To automatically display newly generated batches with matching states, select **Automatic Batch Refresh**.
If the option is cleared, you can use the **Refresh**  button below the batch list.
7. Optional. To skip all the valid fields and focus on the invalid fields only, select **Tab through invalid** fields only.
Note: When you press **Tab** inside a table, the system tabs through invalid table cells only. This option also applies for tabbing backwards by pressing **Shift + Tab**.
8. To speed up typing, enable **Enable text typing auto-completion**. When you start typing, auto-text completes the word, suggesting the best match among all of the words or candidates available after OCR and Format Analysis.

Note: To enable auto-completion for the current page only, select **Use currently opened page only**.

About Workflow

In Web Verifier / Verifier, you verify and correct batches failed in Runtime Server during Document Separation, Classification, or Extraction.

- The workflow settings allow to define the processing of documents in Web Verifier / Verifier.
- Each workflow step has an input and an output state.
- The input state must match the failure output state defined for the corresponding workflow step in Runtime Server.
- After a batch was successfully processed by the workflow step, Web Verifier / Verifier assigns the specified output state to the batch.
- This output state must match the input state of the subsequent workflow step in Runtime Server.

Specifying the Workflow Settings

The workflow settings allow you to define the workflow of documents processed by Web Verifier. After each

processing step, output states are assigned to batches, which distinguish success from failure.

To modify the workflow settings, complete the following steps.

1. In the **Settings** view, select the **Workflow** tab.
2. To activate or deactivate a workflow step, click the corresponding button.
 - Document Separation
 - Classification Verification
 - Extraction Verification
3. Optional. To add an input state, complete the following substeps.
 1. In the **Input State** field, right-click and then click **Add State**.
 2. In the **Add State** dialog box, type a new input state and then click **OK**.
4. Optional. To remove an input state, in the **Input State** field, right-click and then click **Remove State**.
5. Optional. To change an input state, complete the following substeps.
 1. In the **Input State** field, right-click and then click **Change State**.
 2. In the **Change State** dialog box, type a new value and then click **OK**.
6. In the **Input State** field, select a value.
7. From the **Output State** list, select a value.
8. To enable WebCenter Forms Recognition to automatically extract data after the user manually classified a document, select **Perform automatic extraction after manual classification**.

Note: This option is only available if the **Output State** of the **Classification Verification** workflow step matches the **Input State** of the **Extraction Verification** step.
9. To skip valid documents when the user clicks the **Next Document** button or to disable access to already validated documents, select **Disable navigation to valid documents**.
10. To navigate directly to the next invalid batch without displaying the confirmation release dialog box, select **Hide batch release dialog**.
11. To open the first available invalid batch in the batch list, select **By default open the first available invalid batch and not the selected one**.

Note: When you clear this option, the batch selected in the list opens.

Specifying the General Settings

To specify the General settings, complete the following steps.

1. On the Options menu, click Settings.
2. Optional. As an administrator, you can configure settings for different groups. Select Group Settings and then select a group from the list.

Note: Other users configure their own settings by selecting My Settings.

For more information, see *About Groups*.
3. The project file contains the forms used to verify the extraction. To define the project that processes the documents, complete one of the following substeps.
 - To select a project file from the list, select Use project file and then select the required project from the Project list.

The project loads after saving and returning to the Batch View.
 - To specify a project referenced in the batch control file, select Use batch specific project file.

The project loads each time you open a batch and each time a batch opens for a different project.

4. From the Job list, select the name of the job for which you want to process the documents.
5. To select another language, from the Application Language list, select the required language. Web Verifier supports Chinese Simplified or Chinese Traditional, Danish, Dutch, English, French, Finnish, German, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Romanian, Russian, Spanish, Swedish, and Turkish.

6. Optional. To automatically display newly generated batches with matching states, select **Automatic Batch Refresh**

If the option is cleared, you can use the Refresh  button below the batch list.

7. Optional. To skip all the valid fields and focus on the invalid fields only, select Tab through invalid fields only.

Note: When you press Tab inside a table, the system tabs through invalid table cells only. This option also applies for tabbing backwards by pressing Shift + Tab.

8. To speed up typing, enable **Enable text typing auto-completion**. When you start typing, auto-text completes the word, suggesting the best match among all of the words or candidates available after OCR and Format Analysis.

About Exception Handling

Use exception handling to deal with documents that fail in Web Verifier, such as documents with poor document quality or missing information.

You can move such documents into an exception state to flag the batch for issues.

Having a mechanism for handling unexpected errors allows users to remove the batch from their task list. Then, users can manually assign special states to documents.

Defining Exception States

When selecting a state, a menu command becomes available in the Verification View. The menu command allows for case-specific handling of various types of unforeseeable errors. The description represents the menu command's label.

To select an exception state and set its description label, complete the following steps.

1. In the **Settings** view, select the **Exception Handling** tab.
2. To select a state, in the **Selected States** column, select the corresponding check box.

Note: The available exception states cover the range from 601 to 699. A batch state corresponds to the lowest document state within the batch. Routing batches using their exception state is only possible if the state for successful verification is greater than the one used for exceptions.

3. To rename a description, right-click on the description and select **New description**.

Note: This description represents the menu item in the **Move Document to Exception State** list in Verification View.

4. In the **Exception Handling** dialog box, type the new description and then click **OK**.

Note: The maximum character length for the description is 128.

5. Select any of the following options.

Option	Description
Before moving a document to an exception state, save it automatically	Select this option to save a document automatically before moving it to an exception state. Note: This applies to the current document only.
Create new batches with documents marked for exception handling	Select this option to move documents for exception handling to an exception batch. • Creates a batch for each exception code • Each batch receives a new batch ID • Documents from verified batches move to the same exception batch in Batch View • Batches release manually or automatically When this option is not selected, documents for exception handling stay in their batches. These batches keep their batch ID but receive a new name according to the state description.
Automatically release all available pending exception batches that contain [XX] or more documents or older than [XX] minutes	Select this option to release an exception batch once it contains more than [XX] documents or is older than [XX] minutes. This allows critical exception documents to process without waiting for manual intervention. Exception batches will also release when the user logs out.
By default, set exception mode to Batch	Select this option to change the scope of the command Move to Exception State on the Options menu to Batch automatically.
Allow user selection of exception mode (Batch vs. Document)	Select this option to enable the dynamic changing of the exception mode on the Options menu, document verification view. By default, this option switches on. Use this option together with the By default, set exception mode to Batch option to preserve a specific exception mode for the different user groups.

Configuring Supervised Learning

Supervised Learning allows users to nominate documents to the knowledge base job. Only users that have the SLV role assigned can access the Supervised Learning tab.

1. In the **Settings** view, select the **Supervised Learning** tab.
2. To enable Supervised Learning, select **Activate Supervised Learning Workflow**.
3. To specify the job name used to keep track of the documents added to the knowledge base, from the **Knowledge Base Job** list, select a job.
4. To apply global extraction on documents with low extraction rate, select **Always automatically re-extract data for poorly processed documents**.
5. In the **Copy document to global knowledge base** section, select one of the following options.
 - **Only if activated by the user:** To copy the document to the global knowledge base, the user

needs to click the **Nominate for Learning**  button in the **Document View**.

- **Automatically if unclassified or more than [XX] % of fields are invalid:** Select this option to copy documents automatically to the global knowledge base if they meet the configured criteria.

Note: If **Only if activated by the user** is not selected, and the document does not meet the criteria to be copied automatically, the user can still copy a document to the global knowledge base by clicking in the Document View page.

About Batch Filtering

The batch filtering conditions affect the display of the batches. This is useful for finding a subset of batches in a large job or for limiting the user's activities.

The filtering dialog box is accessible outside the settings dialog box, so that users without a SET role but with the FLT role can filter batches. Only users with the FLT role can configure filter conditions.

Saving the settings applies to the current batch view and saves for the next sessions.

Configuring Batch Filter Conditions

To configure batch filter conditions, complete the following steps.

1. On the toolbar, click the **Batch Filtering**  icon.
Note: Users with the SET role can access the filtering window from the **Settings**.
2. In the **Batch Filtering Conditions** dialog box, in the left pane, double-click to copy a field name to the **Select Filter Condition** field.
3. In the right pane, double-click to copy an operator to the **Select Filter Condition** field.
4. In the **Select Filter Condition** field, modify the condition according to your needs.

To see only batches at a state of 550, add the following condition.

```
[State]=550
```

5. Optional. To clear the filter condition settings, click the **Clear Condition** button.
6. Optional. Within the **Group Settings** section, administrators can easily define filter conditions for several user groups.
 1. Select a group from the drop-down list.
 2. Click **Configure Filtering**.
 3. Establish the filtering conditions and confirm by clicking **Apply**.
 4. Click **Save** to save your settings.

Working with the Batch List

The batch list is your work list and appears after starting Web Verifier.

1. If the batch list does not display, on the toolbar, click the **Show Batches**  icon.
2. Optional. To sort the batch list, click the column header by which you want to sort.
3. To start verification, in the list of batches, click on the batch you want to verify.

Depending on the status of the batch, either the classification or the extraction verification view opens.

Batch View Icons

An icon displays in front of each batch to indicate the status. When an icon is not shown, the batch state is out of workflow.

Symbol	Status
	Batch is complete and ready for export.
	Batch requires a correction of the classification results.
	Batch requires a correction of the extraction results.
	Batch is locked by another user or application and is unavailable
	Batch contains documents with exception statuses. To work on the batch, release it when it is unavailable.

Batch View Columns

Batch view columns display the following information about a batch.

ID

A number for uniquely identifying a batch.

State

An integer between 0 and 999 that indicates the progress of batch processing. The state also indicates whether the batch is ready for verification.

Priority

An integer between 1 and 9 that indicates the urgency for processing a batch. 1 is the highest priority and 9 is the lowest.

Name

An arbitrary name that is easier to read than the batch ID.

Folders

Folders organize documents in a batch. The value in this column indicates the number of folders inside the batch.

Documents

The value in this column indicates the number of documents inside the batch.

Last user/Module

This displays the most recent person or computer, and application to process the batch.

Last Access

Displays the latest processing date.

Client

The owner of the Forms Recognition, Contains N/A; not in use yet.

External Group ID

The group ID relates to the security of the batch. It is a unique ID that assigns batches to a user group.

External Batch ID

The external batch ID is the name of the Batch Group. You can use this ID to represent any piece of information you would like to associate with a batch, such as an external system ID or a storage box ID.

Transaction ID

Batches have transaction IDs to identify originators of batches of documents. This allows the developer to synchronize a new batch of documents with another external system.

Transaction Type

Transaction Types helps to identify the type of documents in batches. This allows the developer to synchronize a new batch of documents with another external system.

Note: The External group ID, External Batch ID, Transaction ID, and Transaction Type columns, do not display by default. For more information, see "Additional Columns in Verifier or Web Verifier" in the *Oracle WebCenter Forms Recognition Installation Guide*.

Batch View Toolbar Buttons

The toolbar provides quick access to frequently used commands.

Button	Description
	Displays a property sheet to configure Web Verifier.
	Displays a dialog box to configure the batch filtering condition properties.
	Clicking the arrow to the right of this button displays available filtering options for the list of batches.
	Starts the verification of the current batch. Depending on the batch state, the batch will display in the classification window or in the indexing window.

	Displays the batch structure of the current batch. Selecting a document shows the document view, which provides an overview of the documents inside the batch.
---	---

About the Document View

The document view displays the structure of the batch and the document it contains.

Selecting a document provides an overview of the documents inside the batch.

You can use document view to investigate the documents in a batch.

The levels of the hierarchy are as follows.

- Batch
 - Folder
 - Document
 - Page

Each document entry provides the following information.

- **ID:** A number that uniquely identifies the batch, folder, or document.
- **State:** An integer between 0 and 999 that indicates the progress of batch processing. The batch state corresponds to the lowest value of all folder states and the folder state corresponds to the lowest value of all document states.
- The batch or folder **Name** is an arbitrary name that is easier to read than the ID.
- **Document Class:** The document's classification result.
- **Note:** Depending on your access rights, the document view might list documents that are inaccessible. This is due to their input states which are out of the workflow you have access to.

Working with the Document View

In the document view, complete the following steps.

1. On the toolbar, click the **Show Selected Batch**  icon.
2. To expand or collapse a folder, double-click on it, or click the plus sign or minus sign next to it.
3. Click on a page in the batch structure to display it in the right pane.

Splitting or Appending a Document

In the document list, you can cut multi-page documents into separate documents. You can also merge consecutive pages of documents into one multi-page document. Do the following,

To split a multi-page document, complete the following substeps.

1. Click the **Show Selected Batch**  button.
2. To split a multi-page document, right-click a page and then click **Cut pages into a new document**. If the

cut operation is unavailable, switch back to the original sequence. Right click a page and then perform one of the following actions.

Note: To mark a page as a cover page, right-click on the first page of the document and select **Mark as cover page**.

3. To append a document to another, right-click the document to append, and then select **Append this document to previous one**.

Main Toolbar Buttons

The toolbar provides quick access to some frequently used commands.

Button	Description
	Display a property sheet where you can configure Web Verifier.
	Display a property dialog where you can configure the batch filtering conditions.
	Display the Batch View.
	Start the verification of the currently selected batch. Depending on the batch state, the batch is either displayed in the classification window or in the indexing window. A drop-down list allows users to verify the selected batch or verify the next invalid batch.
	Display the available filters for the batch structure. You can select from among the following options. • All documents • Documents to Classify • Index Documents to Classify • Documents to Index
	Display the first page of the selected batch or a single page of the selected document.
	Display the first two pages of the selected batch horizontally or the first two pages of the selected document.
	Display the first three pages of the selected batch horizontally or the first three pages of the selected document.

	Display the first two pages of the selected batch vertically or the first two pages of the selected document.
---	---

Viewer Toolbar Buttons

The viewer toolbar allows you to adjust the magnification used to display documents using the following commands.

Button	Description
	Fits the document to window height.
	Fits the document to window width.
	Provides the best fit for an image.
	Zooms in.
	Zooms out.

Document View Keyboard Shortcuts

The following keyboard shortcuts are available in document view.

Keyboard shortcuts	Command
Ctrl + 0	Print
Ctrl + Shift + Home	First document
Page Down	Previous document
Page Up	Next document
Ctrl + Shift + End	Last document
Ctrl + 8	Append document
Ctrl + 9	Cut document
Ctrl + Enter	Accept or reject next unsure page
Ctrl + Space	Select next unsure page

Ctrl + 1	Show batches
Shift + Add	Zoom in
Shift + Subtract	Zoom out
Ctrl + Left	Move image to left
Ctrl + Right	Move image to right
Ctrl + Up	Move image upwards
Ctrl + Down	Move image downwards
Ctrl + R	Rotate
Ctrl + Home	Display first page in document
Ctrl + Page Down	Display previous page in document
Ctrl + Page Up	Next page in document
Ctrl + End	Last page in document
Ctrl + H	Fit to height
Ctrl + W	Fit to width
Ctrl + F	Best fit
Ctrl + J	Increase image area
Ctrl + K	Decrease image area

Working with the Verification View

In the verification view, you correct the classification and extraction results. To display the Verification View, complete the following steps.

1. Select a batch from the list that requires verification.
2. Click the **Verify Selected Batch**  button.
Depending on the state of the document, the classification or indexing window opens.
3. Optional. To increase or decrease the image area, drag the vertical bar between the field pane and the image pane either to the right or left.
4. If the classification window is displayed, from the class selection list in the lower pane, select the correct class.

Note: You can also enter the first characters of the required class name to limit the number of classes

displayed.

5. If the indexing window is displayed, the document requires a correction of the extraction result. Correct the invalid fields.

About the Classification and Indexing Results

After classification, the result will be one of the following options.

- Documents with no or a wrong classification display in the indexing window.
- After assigning a class to documents without classes, the indexing window displays with fields ready for manual indexing.
- Documents with the correct class but with invalid extraction results display in the indexing window ready for you to correct the extraction result.

About the Indexing Window

The indexing window displays the form defined in Designer and the current document.

The Form Pane

The form pane displays the form defined in Designer. A form area contains the following main elements.

- **Labels:** Labels are captions that help users identify form fields, viewers and tables.
- **Viewer:** A viewer contains pieces of document.
- **Fields:** A field will display data and allow for entering or editing of data. Fields might be either a text field, table field, check box, list box, or a Yes/No selection. You can use fields to create check boxes and combo boxes.

The Document Pane

The document pane displays the current document or page. All words recognized during the OCR process are highlighted by default. To understand what the highlighting and box outlines represent, refer to the following list.

- Red areas indicate the selection for the current field.
- Yellow lines are candidates, however, another candidate is more likely. If the extraction result is invalid or wrong, these areas may point to the correct indexing data.
- Gray lines highlight the unlearned lines in table correction mode.
- Green lines highlight newly learned lines with high confidence.
- Blue lines highlight newly learned lines with low confidence.

Note: Colors may vary due to customization.

The Input Pane

The input pane below the document displays an enlarged part of the document that relates to the field.

In the field below, you can modify the field content.

Correcting Classification Results

To correct invalid classification results, complete the following steps.

1. In Batch View, select a batch from the state column.
Note: Use the arrow keys to navigate and select a batch.
2. Press Enter to open the Verification View. The Verification View displays the first invalid document in Verify Mode.
3. From the drop-down list in the lower pane, select the correct class and then press Enter.
Note: If you know the correct class name, type the first characters and wait until the system automatically displays the full class name.
 The application validates the document and then updates the state. The next document requiring verification displays automatically.
4. Repeat the previous steps for all documents.
5. After verifying all the documents in the batch, perform one of the following actions.
 - To release the current batch and open the next batch that needs verification, select **Verify the next invalid batch on the list**.
 - To release the current batch and display the Batch View where you can select the next batch, select **Close batch and return to the batch list**.
 - To change verification forms, select **Verify this batch with the next verification form**.
6. To confirm, click **Yes**.

Reclassifying a Document Manually

To assign a document to another class, complete the following steps.

1. To open the classification window, from the **Options** menu, select **Reclassify Document Manually**.
2. Correct the class and then press Enter. This displays the indexing window.

Note: In most cases, index the documents manually because different classes have different sets of fields.

About Processing Documents with an Obsolete Class

Deleting a class will make the class obsolete. Often with Supervised Learning workflow, classes become obsolete because the global project's configuration deletes or just does not insert the class.

The only way to process obsolete document classes is if the class still exists in the project that the document is processing with. Information saves internally about the former parent class assignment, which makes it possible to process obsolete document classes.

About Manually Correcting Extraction Results

To manually correct the extraction results, make sure to enable the extraction verification by checking the Workflow tab of the Web Verifier Settings or the Verifier Properties dialog box.

If this is a regular task, apply the appropriate filter in Batch View using the menu command View > Batch Filter > Batches to verify, extraction only.

Form Elements and Field Types

A form has three main elements: a label, a viewer, and a form field.

From a form field, you can select a text field or table field. Using a text field or table field, you can create check boxes or combo boxes. The field types for validation include Read Only, Multi-line, Combo Box, and Check Box. You can also add a button to a form to fire actions.

Elements of a form can include:

Form fields

Form fields display extracted data. You can also enter and edit data during manual indexing. You can use form fields to create check boxes and combo boxes.

Labels

Labels identify form fields, viewers, and tables.

Viewers

Viewers are sections of document areas, normally those that were extracted to fill fields or tables.

Buttons

Buttons fire project script actions.

Tables

Tables are extracted from documents.

The following is a list of field types and their descriptions:

Read Only

When selected, information on a field is dimmed and cannot be selected or edited.

Multi-line fields

Required in the context of address analysis, but can also be useful in other cases. A multi-line field enables line wrap and displays a vertical scroll bar, if required.

List Box

A drop-down list that lists predefined strings related to the verification document. It can either show the nearest values automatically or show only selected values.

Check Box

A toggle selection for one of two choices of the data input for a field (for example: Yes/No).

Correcting Invalid Results

To correct invalid results, complete the following steps.

1. In Batch View, check the state column to find a batch to verify.
2. Start verifying.
 - In **Verifier**, use the arrow keys to select a batch and then press Enter.
 - In **Web Verifier**, click on the batch.

The Verification View opens in Verify Mode, and the first invalid document displays. The application

places the cursor in the first invalid field.

About Inserting Words in Fields

To speed up verification, you can insert words to replace or append text.

The method for inserting words depends on the availability of candidates.

A candidate is one that matches the learned words for that field. It displays in green, with a border of green check marks if that visual indicator is enabled in Batch Options, when you select it after selecting the field.

Non-candidates display in orange when selected.

You can insert words in fields or table cells. You can append or insert words and use the mouse to append or replace the field.

To use the Append feature, the selected word must appear on the same line as the existing cell text. If not, the selected word will replace the existing cell text.

- **Words that are candidates for cells:** If the word belongs in a cell area, you can append or replace a word in a cell. The Append feature takes the current word behind the candidate and appends the cell text. It places the text in the best location, either to the right or left of the word, and in the cell location based on the text or location of the word. The word belonging to a cell area displays in green when selected. Or, you can replace the text. In the search region, word candidates are all words that are not covered (by location) by other table cells and that have the same beginnings as the whole text of the cell.
- **Words that are not candidates for a cell:** If the word does not belong to cell areas, it displays in orange when selected. Even if it is not a candidate, you can append or replace the word. Appending places the text in the best location, either to the right or left of the word, by text or location of the word. For example, a cell named "C2658" might be appended by "number." Or you can replace the cell text and location by the text and location of a word.

About Editing Text Fields

Verifier and Web Verifier include automated features for editing text fields that can speed up text entry and correction.

You can use automatic character entry, when the auto-completion is selected in the form field Properties dialog box, to edit text fields and cells. Other options for character changes include multi-line fields, combo boxes, and check boxes. You can also insert and replace text in cells and fields, either in single words or blocks of text, using drag-and-drop or by double-clicking on the selected text.

Multi-line fields are necessary for address analysis but can also be useful in other cases. A multi-line field enables line wrap and displays a vertical scroll bar, if required. To add a new line to a multi-line field press Ctrl + Enter.

A Combo box lists predefined strings related to the verification document. To aid in verification, you can select from the list of strings.

The Check box provides an either/or option that toggles table data entry choices on and off. For example, with a Yes or No check box, checking Yes would bring up data entry related to the verification and unchecked for No would hide them.

About Auto-Completion

Auto-completion helps to speed up typing. When you start to type, auto-text completes the word, suggesting the best match among all of the words or candidates available after the OCR process and Format Analysis. For example, you can type the first two characters of a 20-character invoice. The auto-text feature finds the

best-matched candidate suggested by the Format Analysis engine and places it in that field.

The auto-selected text also appears highlighted in the original document. Select whether a single-line or a multi-line text field should display. To override auto-completion, continue typing the desired text.

The auto-completion feature for a header field should automatically select the best candidate, which works within Highlight Candidates mode. The viewer is only updated if the candidate appears once in the document; otherwise, when the word for the field is inserted by auto-completion, the viewer will be blank.

Note: Auto-completion does not work on formatted text and characters incorrectly read by OCR.

About Fields

A field displays data and allows the user to enter or edit data. To understand fields and the different types, refer to the following lists.

The following list explains the meanings of the colors and icons for both **Web Verifier** and **Verifier**.

- A red frame for **Web Verifier** and a blue arrow  icon for **Verifier** indicates the current field.
- A blue frame for **Web Verifier** and a green check mark  icon for **Verifier** indicates a valid field extraction.
- A red triangle in the right upper corner for Web Verifier and a red  icon for Verifier indicates a field that is needing validation because of its low confidence extraction.

The following list explains the field types.

- A user cannot edit or select a Read Only field.
- An Auto-completion field enables the user to edit text by typing the first few letters of a word until best matching candidate appears.
- A Multi-line field enables line wrap and displays a vertical scroll bar. This field type is a requirement for address analysis.
- A List box contains a selection list to verify an item in a document.
- Check boxes are toggle selections for data input that derive from form fields.

Navigating Through the Fields

To navigate through the fields, complete any of the following actions.

- Use the mouse. This method does not affect the validation state of a field.
- Press Tab. This method gets you to the next field, but not to the next document. This method does not affect the validation state of a field.

Note: The order that the Tab key moves through the form is defined in field properties. For more information, see "Add a form field" in the *Oracle WebCenter Forms Recognition Designer User's Guide*.

- Press Shift + Tab to go to a previous field.
- Press Enter. This method validates the entire field or the next invalid character within a field. Once the field is correct, it validates and the focus moves to the next field that requires correction. This field may also be within another document.

Using a Word that is a Candidate for a Field

If the word is a candidate for a field, you can copy it into the field box. A candidate is a word that matches the learned selections for the field. To copy text to the field box, complete the following steps.

Prerequisite Ensure the word fits the format analysis rules for the specific field.

1. On the document, click on the text you want to copy. A box appears around the word.
2. Double-click on the text or right-click in the text, and then select **Copy to Current Field**.

Note: You can insert only one candidate per field per document verification session.

Using a Word That is not a Candidate for a Field

Even if the word does not belong to any candidates for the field, you can append or replace a word with a new one. Appending places the text in the best location, either right or left of the word, by text or location of the word. Or you can replace the field text and location by the text and location of a word. A word that does not belong to any candidates for that field will display in orange when selected. For example, a field named “sales total” might be replaced by “invoice total.” To use a word that is not a candidate for field, complete one of the following options.

- To append text with the new text, drag a box around the desired word. Double-click on the word in the box, or right-click in the document and select **Append Field Text by Word**.
- To replace text, select the word with the mouse. A box appears around the word. Double-click it, or select **Replace Field Text by Candidate** in the shortcut menu.

Note: You can insert only one candidate per field per document verification session. Make sure that this word fits the format analysis rules defined for that field. If not, the word is highlighted in orange (and with a border of orange exclamation marks if validity icons are enabled) to help distinguish it. If so, it would not be a good candidate for the field.

Inserting Blocks of Text

Inserting blocks of text is helpful when working with multiple data verification elements. To insert blocks of text, complete the following steps.

1. On the document, drag over the text.
2. Optional. Use the handles to adjust the selection.
3. To replace the selected text in the field or table cell, complete one of the following substeps.
 - Drag the selection to the field or table cell.
 - Double-click on the selection.

Finishing the Validation

To finish validating after correcting a field, complete the following steps.

1. Press Enter to validate.
The cursor will automatically move to the next invalid field, regardless of whether the field is in the same or next invalid document. Leaving the document this way validates it automatically.
2. Select the next step by clicking **Yes** or **No**.
 - **Verify next invalid batch on the list.** This releases the current batch and opens the next batch that needs verification.
 - **Close batch and return to the batch list.** This releases the current batch and displays the Batch View.
 - **Verify this batch with the next verification form.** Change verification forms using the next verification form.

About Manual Indexing

Manual indexing is done if the Runtime Server was not configured to do the extraction step. Your input consists of batches with valid classification results, but no fields have been filled so far.

For manual indexing, your Web Verifier workstation is configured as follows:

- Classification verification is disabled.
- Extraction verification is enabled.

To determine your settings, check the workflow tab of the Web Verifier Settings dialog box.

If you do this task regularly, you may want to apply the appropriate filter in the Batch View using the menu command View > Batch Filter > Batches to verify, extraction only.

Indexing a Document Manually

To index a document manually, complete the following steps.

1. In Batch View, check the State column to find a batch you can verify and then select the batch.
2. The Verification View opens in Verify mode and the first document displays. **Web Verifier** places the cursor in the first field.
3. Enter the value for the first field.
4. Press Enter to validate the entry. In the next field, proceed as described above.
Note: The cursor automatically moves to the next field regardless of whether the field is in the same or the next invalid document. If you leave the document this way, it validates automatically.
5. After indexing all the documents in the batch, the application prompts you to select one of the following choices.
 - **Verify next invalid batch on the list.** This releases the current batch and opens the next batch that needs verification.
 - **Close batch and return to the batch list.** This releases the current batch and displays Batch View where you can select the next batch.
 - **Verify this batch with the next verification form.** This changes verification forms, using the next verification form.
6. To release the batch, click **Yes**.

About Working with Tables

You can verify tables in the same way you would correct an invalid header field.

Additional methods to simplify manual table extraction, such as the Correct Table feature, are available.

Traditional training and correction methods

Inserting Candidate Words in Table Cells

You can insert single words or append existing text in table cells. To insert words in table cells, complete the following steps.

1. To select the text you want to insert in a table cell, complete one of the following actions.
 - Double-click on the word.
 - Right-click on the word in the image viewer and select the respective option.
 - If you have candidates, double-click the desired candidate to replace it.

2. To replace text with the new text, select **Copy to current field**.
3. To append text with the new text, select **Append Field Text by Word**.

Inserting Non-Candidate Words in Table Cells

Even if the word does not belong to any candidates for the cell, you can insert single words, append or replace existing text in table cells. To insert words in table cells, complete the following steps.

1. To append the selected text to the cell text, double-click the word or right-click in the document pane.
2. Select **Align & Copy to Current Field**.
3. To replace the cell text with the selected text, select the word, right-click and then click **Copy to Current Field**.

About Correcting the Table Structure

Under the table within the verification mask, there are buttons for modifying the table structure. The available commands are summarized in the following table.

Button	Command	Description
	Delete all rows	Deletes all rows from the table. You will need to relearn the lines on the invoice.
	Insert new row above	Inserts an empty row above the current one.
	Delete selected row	Deletes the current row. To select a row, click on its number. The appropriate line on the invoice is unlearned and loses its color highlighting.
	Append	Appends an empty row at the bottom of the table.

Table extraction and correction

About Lines

The WebCenter Forms Recognition Table Extraction engine considers the following main types of the lines.

Primary line

A line that defines table structure. The engine applies advanced and precise similarity analysis for all primary lines. It is important that all primary lines are well-structured and that they look similar in many of the rows to extract. The engine easily supports an unlimited number of types of primary lines for one table definition. The primary line must contain at least four words. Otherwise, the engine will not learn it. In addition, the primary line must be the first line in the table row.

Secondary line

A line between primary lines. The engine applies smooth similarity analysis for these types of lines, which is possible because WebCenter Forms Recognition Table Extraction only searches the area between two neighboring primary lines. This allows the engine to extract data that varies widely, which often happens with multi-line descriptions. There is also no limit to the number of words in secondary lines, and no limit to the number of secondary lines. However, a document's page must have at least

one primary line; otherwise, secondary lines on this page are not extracted.

Wrong line

A primary line that is learned as a negative line sample. In other words, all lines classified by the engine as members of one particular “wrong” line class are not extracted. In principle, it is possible to learn an unlimited number of wrong lines, though the current restriction is that this will only take effect during in-document learning. Cross-document learning (that is, learning the whole document after all the fields are completely valid) may not automatically train the wrong lines.

After it learns any type of line, the WebCenter Forms Recognition Table Extraction engine automatically creates and manages a new line class (cluster). Afterward, all lines in the document considered by the engine to be members of the line class (similar to the learned line sample) will be extracted, or not extracted in the case of “wrong” lines.

It is possible to learn an unlimited number of different line classes. However, the overall quality may suffer if too many lines are learned.

Learning lines can be applied in lines learning (or lines highlighting) mode. Mapping of the column data in the lines can be done in column mapping learning (or columns highlighting) mode. The user can switch between learning (highlighting) modes with the Switch Table Highlighting menu option in Verifier Options menu or with the context menu options Show Lines and Show Columns.

About Learning Column Mapping

When learning the mapping for columns, the user trains the engine on how the data from the extracted lines must be mapped to the user's table data.

For primary lines, this mapping can be defined differently for different line classes. For example, if a user learned two different line samples that went to two different lines classes internally in one document, the user can then map “Unit Price” in the document to the “Unit Price” data column and the “Total Price” to the “Total Price” for the first line sample. For all lines of the second line type, the user can map “Unit Price” to “Total Price” and “Total Price” to “Unit Price.” For the next document, the WebCenter Forms Recognition Table Extraction engine will always use mapping rule #1 for the lines classified to the first line type and mapping rule #2 for the lines classified as the second line type.

If you have several WebCenter Forms Recognition Table Extraction tables in one class, the learnset is shared between these tables. In other words, if you used interactive learning for one WebCenter Forms Recognition Table Extraction table, cross- document learning, which happens if the system added the document to the learnset after document validation, is applied for all WebCenter Forms Recognition Table Extraction tables in the document.

About Correcting Fields in Tables Created with WebCenter Forms Recognition Table Extraction

Any time you train a table interactively, complete the required training first and then manually verify the table. WebCenter Forms Recognition Table Extraction can train line types and column mapping for each type of line.

When working with interactive table extraction, learn the lines before you map the columns.

Because of the way interactive table verification works, you cannot manually delete data from a cell. Rather, if you want to discard cell data, unmap the column and re-extract the table to remap the column. Although it will seem as if you deleted the data, the data is still be there until you unmap the column.

Using the Standard Method for Table Extraction

The standard method for table extraction is the simplest way to use interactive WebCenter Forms

Recognition Table Extraction learning. To use the standard method, complete the following steps.

1. [Show the First Row Sample](#).
 2. Learn mapping.
 3. Learn missing lines.
 4. Adjust the mapping.
 5. Apply corrections.
 6. Learn the document.
- Showing the First Row Sample

To show the first row sample, complete the following steps.

1. To select the WebCenter Forms Recognition Table Extraction table, click any table field inside the table grid.
2. Click the **Correct Tables**  button.
3. Double-click the first row and select the **Learn As Row** function to show the row sample.
Note: Turning off the **Correct Tables** button causes the loss of learned rows and columns. Turning the **Correct Tables** button back on leads to the loss of mapped table data.
4. Optional. To learn a new line as a primary line, right-click any gray line on the document, and then select **Learn Line**.
5. Optional. To learn a block of lines as primary lines, drag over the primary lines on the document, right-click, and then select **Learn as Primary Line(s)**.
6. Optional. To learn a block of lines as a table row, drag over the primary lines on the document, right-click, and then select **Learn as Row**.

Note: Do not try to learn the rest of the missing secondary or primary lines now. If you attempt to train all different line samples now, you would need to learn the columns mapping separately for every line class. If you first learn the column mapping for the row you just learned, the next time you learn another line sample, the engine tries to apply existing mapping rules for the newly learned row automatically, significantly reducing the time to train the table.

Learning Mapping

To highlight the row you learned, complete the following steps.

1. Right-click a line and select **Show column**.
2. Mark the location of the first cell item in the row you learned.
 The system displays a special mapping control asking for the data column to extract the data to.
3. Right-click the first cell item in a column. Choose **Map Column**, select the required data column, and then click the selection.
4. Repeat the steps for the cell items in the first row.

Learning Missing Lines

To learn if text is missing from a row, complete the following steps.

1. Switch to the lines highlighting mode.
Note: Pressing Ctrl + Q switches the highlighting between three modes: cells, lines, and columns. Press Ctrl + Q twice to switch from columns learning to lines learning.
2. Mark the next missing row and learn it as before.
3. Repeat the steps for all rows on all pages, and then continue if nothing is missing.

Adjusting the Mapping

To adjust the mapping of a missing or incorrect column, complete the following steps.

1. Return to columns mapping learning mode.
2. Find incorrect or missing mapping, and then correct the mapping.
3. If you can't map the missing columns, switch back to the lines highlighting mode, and then learn the row where the mapping is missing.
4. Switch to columns highlighting. If the mapping is still missing, mark the missing part and map it.

Note: The WebCenter Forms Recognition Table Extraction engine may determine the mapping automatically.

5. Repeat steps until the data is completely extracted. The extraction results may not reach 100 percent.

Applying Corrections

To apply corrections and validate table fields, complete the following steps.

1. Switch to cells highlighting mode and manually correct missing data and OCR errors.

Note: Do not use interactive learning because every WebCenter Forms Recognition Table Extraction learning action reactivates extraction and replaces all your manual inputs instantly.

2. To validate the table, press Enter.
3. Optional. Click the **Add Current Document to Local Learnset** button to add the document to the learnset and then learn it, which is known as cross-document learning. Do this if the system did not suggest learning the document automatically.
4. **Note:** The only requirement for cross-document learning is correctness and completeness of the table data to train. This means that location, content, and format of every cell item is accurate.

Learning the Document

After table learning and validation are complete, you may want to add this document to the learnset and then learn it. This is known as "cross-document" learning, in contrast with "in-document" interactive Brainware Table Extraction learning.

1. If you want to learn a document that the system did not automatically learn (the Add Current Document to local learnset button is not cleared), you can activate learning by clicking Add Current Document to Local Learnset.

Note: The only requirement for cross-document learning is correctness and completeness of the table data to train. This means that location and content of every cell item should be correct. Also, ideally, the content of cell items should not be formatted.

Advanced Learning with WebCenter Forms Recognition Table Extraction

It is necessary to use secondary lines explicitly when a row begins on one page and ends on the next, or when learning an unmapped secondary line leads to an extraction. Refer to the following cases to understand more about these circumstances.

Case 1: A row begins on one page and ends on the next

If a table row begins on one page and ends on the next page, you must use the Learn as Secondary Lines function in lines learning mode to train missing secondary lines.

In this case, these secondary lines appear right before the first primary line on the page. Mark all the secondary lines by right-clicking and selecting Learn as Secondary Lines.

Note: Never use the Learn as Row function in this case, as this tells the engine that the first secondary

line is actually a new sample of primary line. As a result, the engine may split table data into new rows.

Case 2: Learning of unmapped secondary lines leads to unwanted extraction

Sometime the engine extracts data from secondary lines when it's not a requirement for your project. In this case, not learning these secondary lines prevents unnecessary extractions.

Use the Learn as Secondary Lines function instead of Learn as Row to learn certain lines. You can also Unlearn Lines to correct or adjust the extraction.

Learning a Block of Secondary Lines

To learn a block of secondary lines, complete the following steps.

1. On the document, click and drag over the secondary lines of a multi-line row.
2. Right-click on the selection and then click **Learn as Secondary Line(s)**.
3. Optional. Repeat the previous steps if lines did not extract.

Unlearning a Line

Discard previously learning for a particular line with the **Unlearn Line** function. To do this, WebCenter Forms Recognition Table Extraction uses a line sample, searches for the line type, and then removes the line type from the learnset.

To unlearn a line, complete the following steps.

1. Switch to **Lines Learning** mode.
2. Right-click on the line you want to unlearn and then click **Unlearn Line**.

Unlearned lines change from green to gray.

Learning a Line as a Wrong Line

Learning a wrong line means training the table to not extract particular lines. This applies to similar lines in the table.

To learn a line as a wrong line, complete the following steps.

1. Right-click on any learned line or click and drag over multiple lines.
2. From the shortcut menu, select **Learn as Wrong Line**.

Note: These steps affect similar lines, which appear in gray.

About Manually Correcting the Automatic Document Separation

To manually correct documents after automatic separation, navigate to Document Browsing mode. When the next batch opens, the system will automatically display the first uncertain page split or merge.

When an entire batch returns to the "failed document separation" state, that means the automatic separation has at least one unsure page separation or merge. The Batch  Fail icon indicates that the batch will need a manual validation.

Here, you have the following options.

- [Toggle the unsure status](#)
- [Split the Document into two Separate Documents](#)
- [Merge a Document with the Previous Document](#)
- [Go to the Next Unsure Page](#)

- [Reorder the pages.](#)

About Toggling the Unsure Status

Toggling the unsure status of a page sets the page to the manually accepted state or to the manually rejected state.

There are three different states for page correction status.

- The blue page icon indicates extraction with a high confidence.
- The blue page icon with a red question mark indicates extraction with a low confidence.
- The blue page icon with a green check sign indicates a manual correction or acceptance.

Splitting the Document into two Separate Documents

When cutting the document into two separate documents, the page where the cutting is occurring will become part of the “bottom document,” and all the other pages become the “top document.” The current page and the preceding page automatically get “manually accepted” page correction status.

To split a document, complete the following step.

- From the Document menu, select Cut Document.

Merging a Document with the Previous Document

A document can merge with the previous document. The current page and the last preceding page automatically get “manually accepted” page correction status.

To merge a document, complete the following steps.

1. Select a document.
2. From the **Document** menu, select **Append Document**.

Going to the Next Unsure Page

This action selects the next unsure page to verify without changing any page states. The next unsure page has a red question mark.

To proceed to the next unsure page, complete the following step.

- From the Document menu, choose Select Next Unsure Page.

Reordering Pages

Reorder the pages within the document tree. To move a page to another position, complete the following steps.

1. Perform a long left-click on the page.
A tooltip appears indicating to specify the new position.
2. Drag the page to the new position.
A dynamic green position line indicates the new position.
3. Click **Yes** on the reprocessing notification to complete the page reordering.

Note: Reprocess the document after reordering the page.

About Page View Modes

When verifying the accuracy of automatic page separation in Web Verifier, you can switch to a more convenient page view mode.

There are four different page view modes.

- Single page (default)
- Two pages displayed vertically.
- Two pages displayed horizontally.
- Three pages displayed horizontally.

In multi-page view, page presentation behavior is as follows:

- In the two-page mode, the current page is on the right in the horizontal view and on bottom in the vertical view.
- In the two-page mode, the first image shows the previous page of the current document or the last page of the previous document.
- In the three-page mode, the current page is in the middle, the first image shows the previous page of the current document or the last page of the previous document. The third image shows the next page of the current document or the first page of the next document.

Changing View Modes

To change view modes, complete the following step.

- From the View menu, select Multi-Page View, and then select an available option.

Checking Entire Batches

To check all the documents in a batch, complete the following steps.

1. In Batch View, select a batch from the list that requires verification.
2. Click the **Verify Selected Batch**  button.
Verification View displays the first document requiring correction.
3. To display the first document in the batch, click the **First Document**  button.
4. Optional. You may encounter a document with incorrect classification.
 - For **Verifier**, press **F7** to open the classification window. Next, select the corresponding entry from the drop-down list in the lower pane, and then press **Enter** to confirm.
 - For **Web Verifier**, select **Reclassify Document Manually** from the **Options** menu. Next, select the corresponding entry from the list at the bottom, and then press **Enter** to confirm.

This displays the indexing window.

5. Correct the extraction results by typing into the corresponding fields, and then press **Enter** to validate.
 - For **Verifier**, press F3 to return to the document.
6. Go to the next document and repeat the previous steps.
 - For **Verifier**, press Ctrl + Alt + Page Down.
 - For **Web Verifier**, click the **Next Document**  button.

Classification Window Keyboard Shortcuts

The following keyboard shortcuts are available in the classification window.

Keyboard shortcuts	Command
Ctrl + 0	Print
Ctrl + Shift + Home	First document
Page Down	Previous document
Page Up	Next document
Ctrl + Shift + End	Last document
Ctrl + 8	Append document
Ctrl + 9	Cut document
Ctrl + Enter	Accept or reject next unsure page
Ctrl + Space	Select next unsure page
Ctrl + 1	Show batches
Shift + Add	Zoom in
Shift + Subtract	Zoom out
Ctrl + Left	Move image to left
Ctrl + Right	Move image to right
Ctrl + Up	Move image upwards
Ctrl + Down	Move image downwards
Ctrl + R	Rotate
Ctrl + Home	Display first page in document
Ctrl + Page Down	Display previous page in document
Ctrl + Page Up	Next page in document
Ctrl + End	Last page in document
Ctrl + H	Fit to height

Ctrl + W	Fit to width
Ctrl + F	Best fit
Ctrl + J	Increase image area
Ctrl + K	Decrease image area
F7	Reclassify document manually
F9	Move to exception state
Ctrl + E	Release exception batches
Ctrl + T	Correct table
Ctrl + Q	Switch table highlighting

Classification Window Toolbar Buttons

The toolbar provides quick access to some frequently used commands.

Button	Description
	Not available in classification view.
	Displays the Batch View.
	Not available in classification view.
	Displays the Document View.
	The scope of this command depends on the Exception Mode set on the Options menu. Two options are available: Move Document to Exception State or Move Batch to Exception State. Clicking the arrow next to this button displays a list of exceptions. You can use these exceptions if you cannot correct a document at all—for example, because it belongs to none of the defined classes. Check with your administrator to determine which exceptions to use. Note that in order to avoid selection conflicts, only the toolbar button provides a list of exception handling states to choose from. The selection made here will also apply if you move a document to exception state by selecting the appropriate option within the Options menu.

	Highlights candidates – not available in classification view.
	Fits the current image to the height of the window.
	Fits the current image to the width of the window.
	Fits the current image to the width or height of the window so that maximum enlargement is obtained.
	Zooms in.
	Zooms out.
	Not available in classification view.
	Keeps the established zoom settings on each document you view in the batch.
	Moves image to the left.
	Moves image to the right.
	Moves image upwards.
	Moves image downwards.
	Displays the first page in document. This button is only enabled if the current document has more than one page. If you click on it, the first page is displayed.
	Displays the previous page in document. This button is only enabled if the current document has more than one page. If you click on it, the previous page is displayed.
	Displays the next page in document. This button is only enabled if the current document has more than one page. If you click on it, the next page is displayed.
	Displays the last page in document. This button is only enabled if the current document has more than one page. If you click on it, the last page is displayed.

	Rotates current page clockwise.
	Displays the first document in the batch.
	Displays the previous document in the batch.
	Displays the next document in the batch.
	Displays the last document in the batch.

Indexing Window Keyboard Shortcuts

The following keyboard shortcuts are available in the indexing window.

Keyboard shortcuts	Command
Ctrl + 0	Print
Ctrl + Shift + Home	First document
Page Down	Previous document
Page Up	Next document
Ctrl + Shift + End	Last document
Ctrl + 8	Append document
Ctrl + 9	Cut document
Ctrl + Enter	Accept or reject next unsure page
Ctrl + Space	Select next unsure page
Ctrl + 1	Show batches
Shift + Subtract	Zoom in
Shift + Add	Zoom out
Ctrl + Left	Move image to left
Ctrl + Right	Move image to right
Ctrl + Up	Move image upwards
Ctrl + Down	Move image downwards

Ctrl + R	Rotate
Ctrl + Home	Display first page in document
Ctrl + Page Down	Display previous page in document
Ctrl + Page Up	Next page in document
Ctrl + End	Last page in document
Ctrl + H	Fit to height
Ctrl + W	Fit to width
Ctrl + F	Best fit
Ctrl + J	Increase image area
Ctrl + K	Decrease image area
F7	Reclassify document manually
F9	Move to exception state
Ctrl + E	Release exception batches
Ctrl + T	Correct table
Ctrl + Q	Switch table highlighting

Indexing Window Toolbar Buttons

The toolbar provides quick access to some frequently used commands.

Button	Description
	Not available in Indexing Mode.
	Displays the Batch View.
	Not available in Indexing Mode.
	Displays the Document View.

	The scope of this command depends on the Exception Mode set on the Options menu. Two options are available: Move Document to Exception State or Move Batch to Exception State. Clicking the arrow next to this button displays a list of exceptions. You can use these exceptions if you cannot correct a document at all — for example because it belongs to none of the defined classes. Check with your supervisor to determine which exceptions to use. Note: In order to avoid selection conflicts, only the toolbar button provides a list of exception handling states to choose from. The selection made here will also apply if you move a document to exception state by selecting the appropriate option within the Options menu.
	Highlights Candidates – Clicking this highlights all areas in yellow that were taken into account to fill the current field.
	Fits the current image to the height of the window.
	Fits the current image to the width of the window.
	Fits the current image to the width or height of the window so that maximum enlargement is obtained.
	Zooms in.
	Zooms out.
	If this button appears pressed down, the application always displays the document area that is associated with the currently selected field.
	Keeps the established zoom settings on each document you view in the batch.
	Moves image to left.
	Moves image to right.
	Moves image upwards.
	Moves image downwards.
	Displays the first page in document.

	Displays the previous page in document.
	Displays the next page in document.
	Displays the last page in document.
	Rotates current page clockwise.
	Displays the first document in the batch, and the application switches to Browsing Mode.
	Displays the previous document in the batch, and the application switches to Browsing Mode.
	Displays the next document in the batch, and the application switches to Browsing Mode.
	Displays the last document in the batch, and the application switches to Browsing Mode.
	Apply global extraction.
	Copy to global knowledge base.
	Correct tables.

Printing a Document

To print a document, complete the following step.

1. Select **File > Print**.
Note: This function is not available in the batch list view.
2. In the **Print** dialog box, select the required settings and then click **Print**.

Printing Verified Data Content

To configure the print settings with the Print Setup dialog box, go to File > Print Setup. Here, you can select the field names and content to print.

The order that the fields print depends upon the order of the fields in the Form Design mode of the Designer application.

When a document prints, the header includes the document file name and the document class.

The following print setup options are available.

- Print image allows you to print pages of the document file.
- Print form activates printing of the verification form.

- Print hidden fields prints the visible fields on the current verification form and all the fields available in the document.
- Print table fields is on by default.
- Print column header on each printed table page is available only when the Print table fields option is on.
- Always show the dialog when printing shows the Print Setup dialog box when users press print.