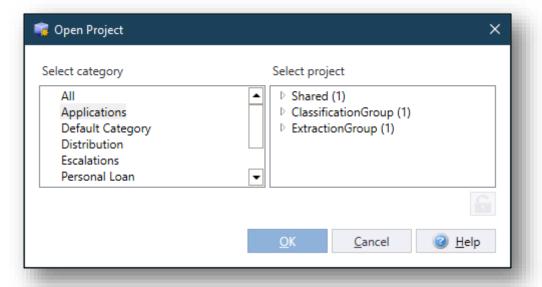


- 3 project types
 - Shared Project
 - Classification Group
 - Extraction Group

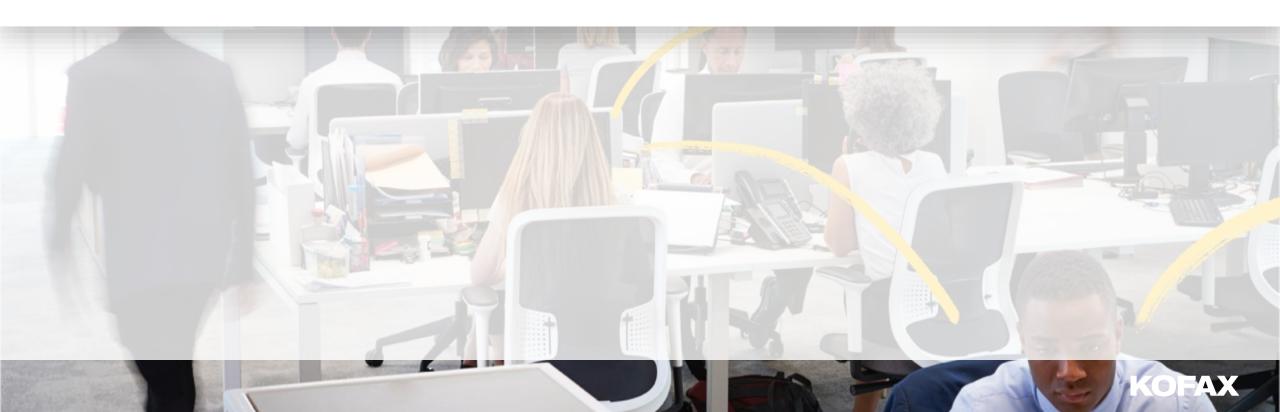




- 3 project types
 - Extraction group (EG)
 - Combines a hierarchical set of document types
 - A document type is equivalent to a Transformation class
 - Each EG has one base document type
 - Classification group (CG)
 - Consists of 1 or more EGs
 - Each EG's base document type equals the Transformation Project Class → Project level fields/locator not supported
 - Shared Project
 - Internally 1 CG consisting of one EG

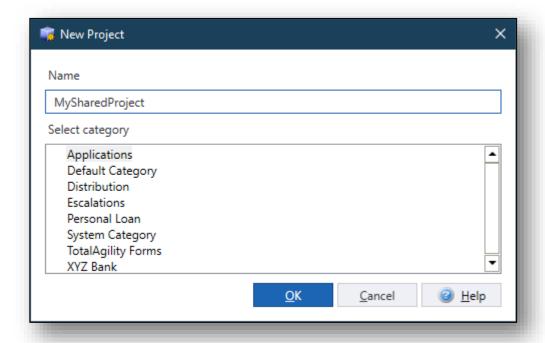
- TD can only be started from Start menu not from within TA
- Import legacy project in TD
 - Saves it in TA DB automatically
 - Training set conversion forced
 - No "just looking", project always imported into TA
 - Creates 1 classification group and 1 extraction group
- Export to file-based project

Projects



Projects

- Creating Shared Projects
 - New Project dialog

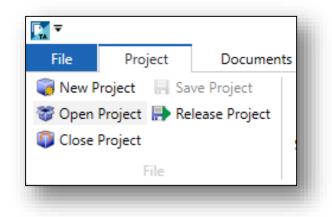




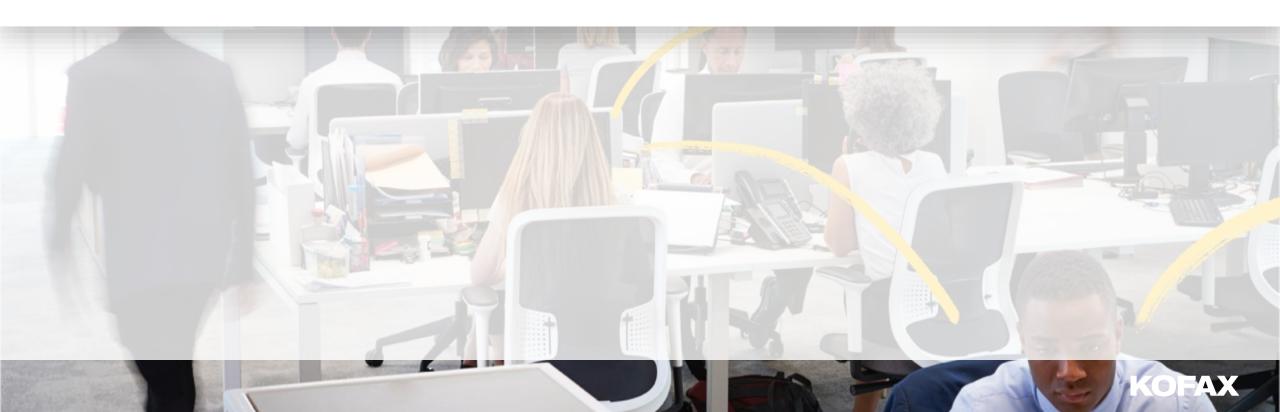
For reusability you must use Extractions Groups and Classification Groups, created in TotalAgility Designer

Projects

- Managing Projects
 - Closing Projects without closing Transformation Designer

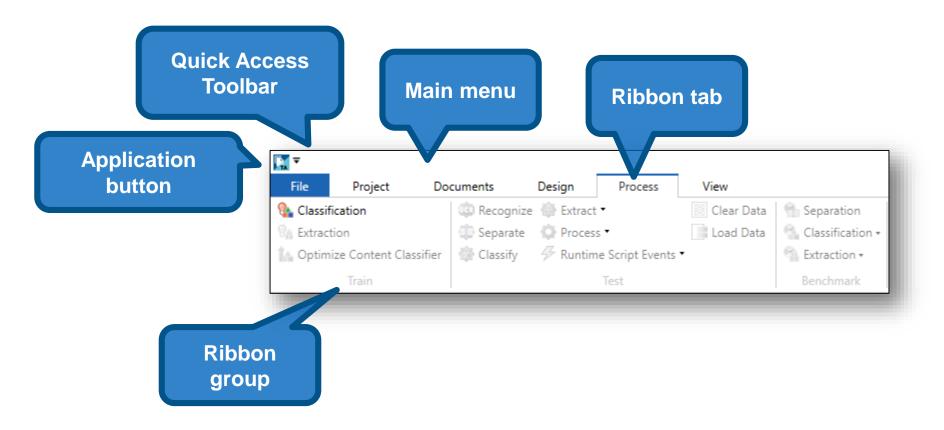


Ribbon



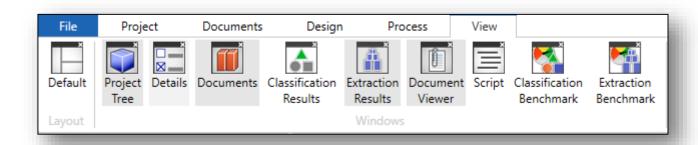
Ribbon

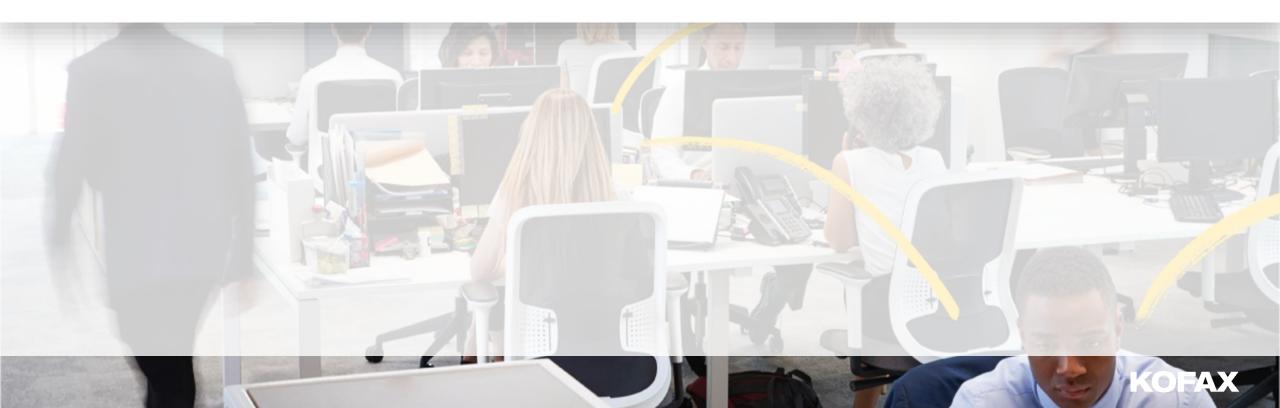
How things are called



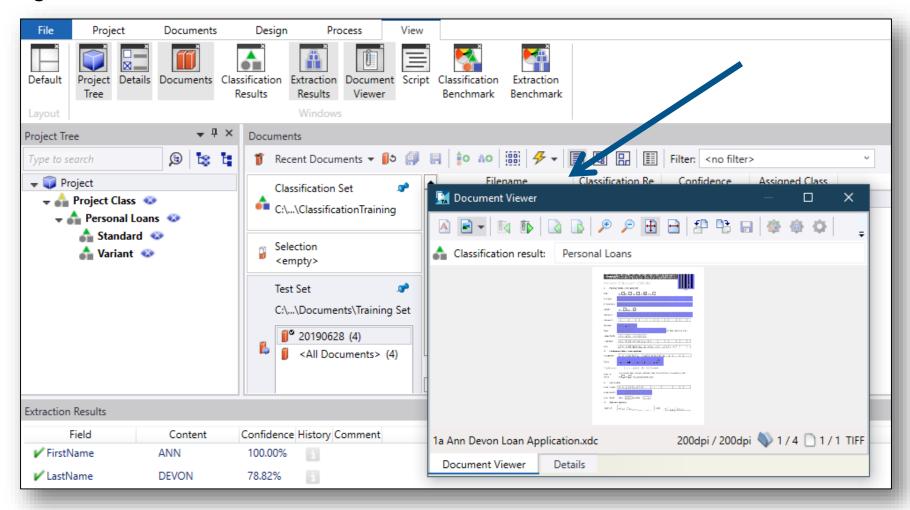
Ribbon

- Ribbon tab "View"
 - Managing docking windows and panels
 - See and configure which panels/windows are visible
 - "Panic button" → restore to "Default"

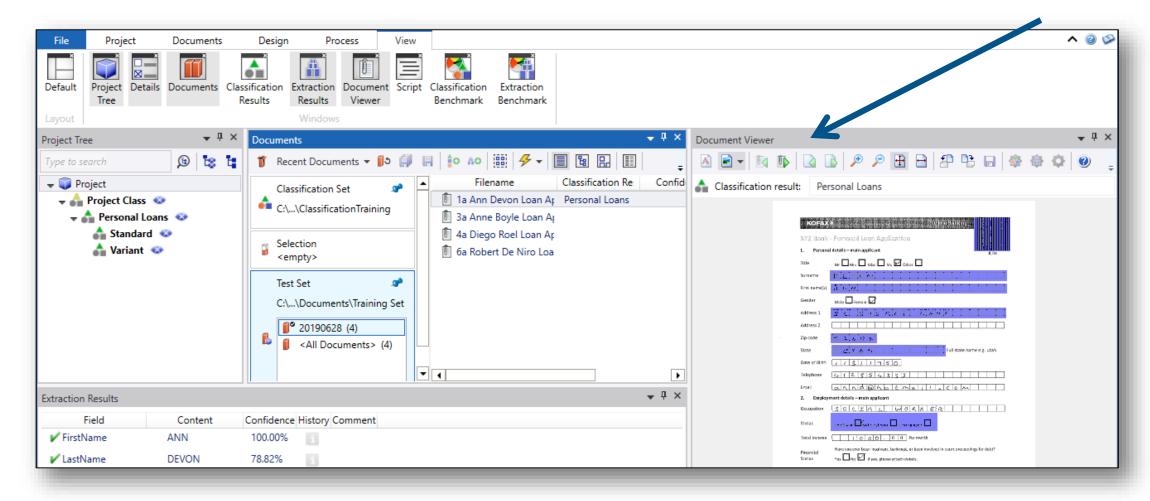




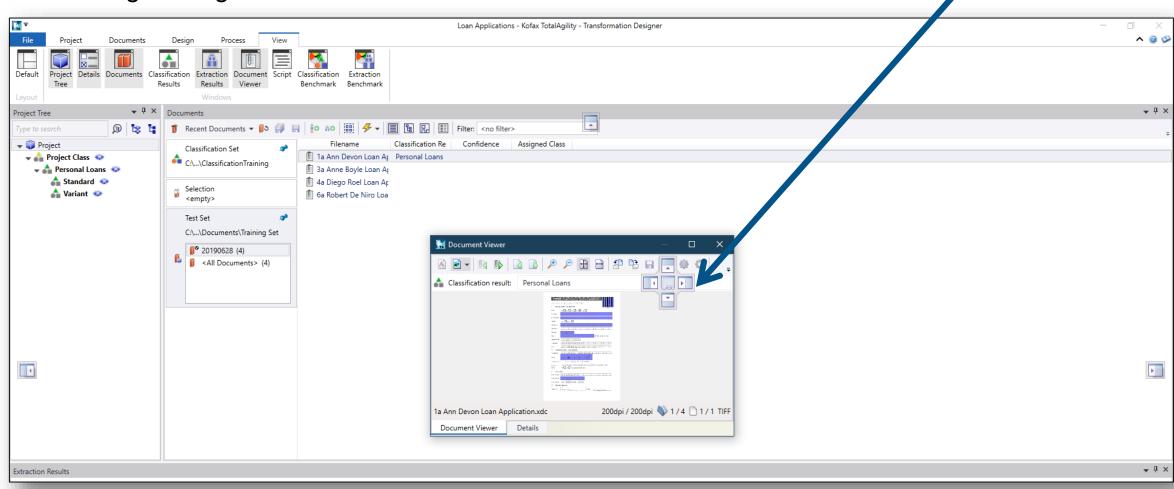
Floating Window



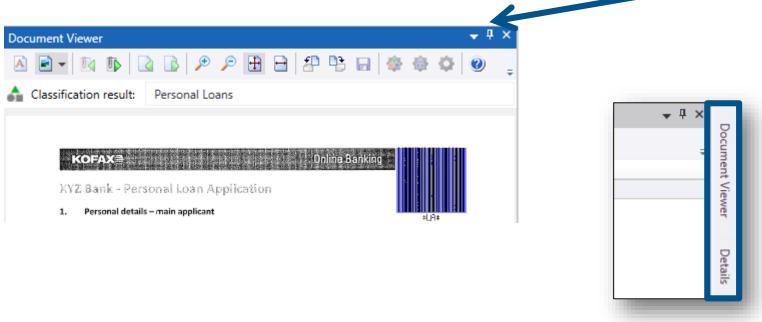
Docked Window



Docking Manager

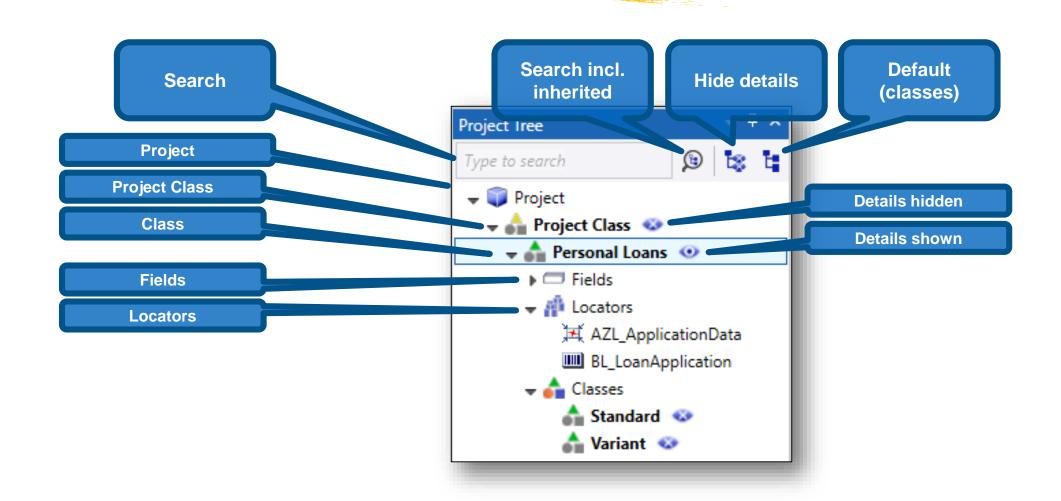


Auto-hide





- The project tree will display different options depending on whether you have opened a classification group or extraction group
- Classification groups and extraction groups should be created in the TotalAgility Designer and edited in the Transformation Designer
- This is a change from KTM where both existed in the same project

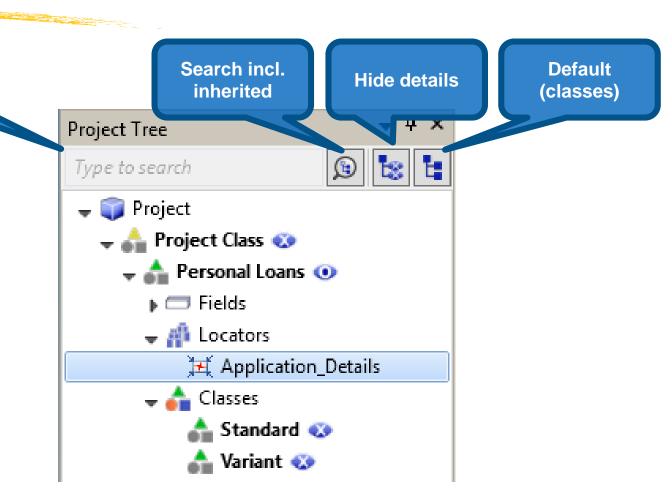


- Searching
 - Partial search, auto-complete

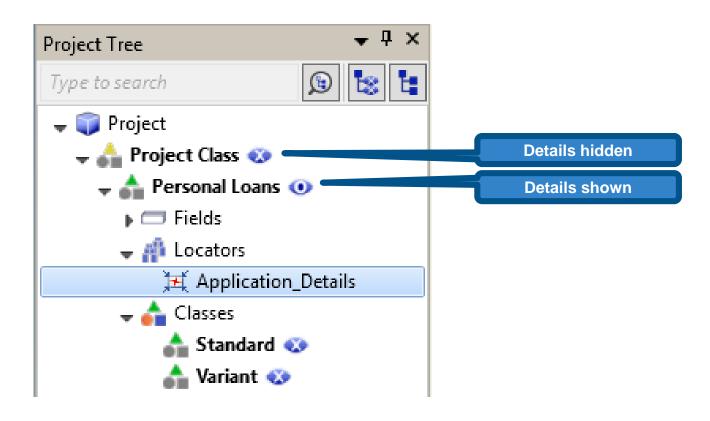
Search

Include/Exclude inherited items in/from search

- "Close all eyes" hide all details
- Reset view back to class hierarchy
- Multi selection supported



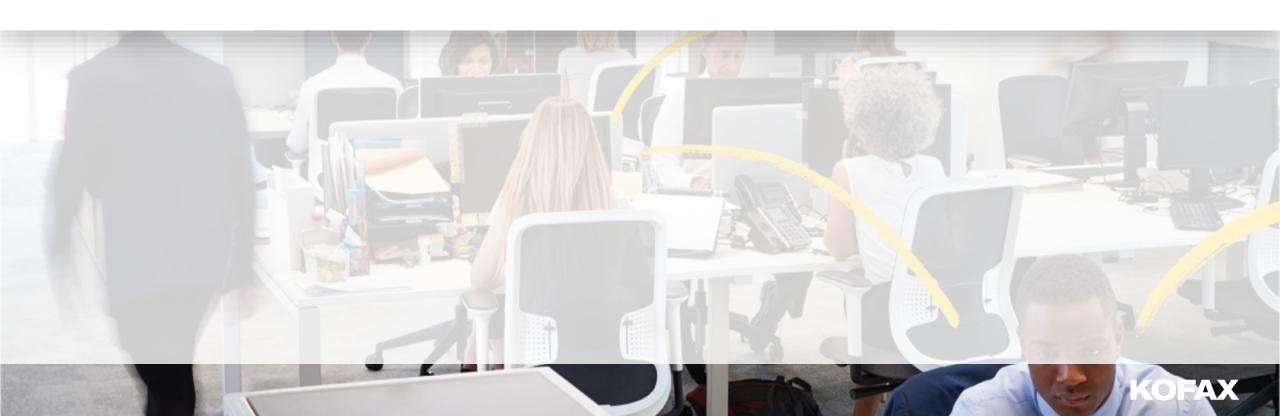
- Content
 - Basic class structure
 - All details per class / folder



Main nodes Project Tree Type to search **Project** 🥡 Project **Project Class** 🕳 📤 Project Class 🐼 **Class** 📤 Personal Loans 🐽 Project ▶ □ Fields Project Class (the base class) Classes (Document Types) 📤 Standard 👀 📤 Variant 🐼

Details **▼** ₽ × Project Tree Fields, Locators, Instructions and Classes Type to search Project 🚽 📤 Project Class 👀 🚽 📥 Personal Loans 🐽 ▶ □ Fields Locators Locators 🕳 📤 Classes 📤 Standard 🐼 📤 Variant 🐼

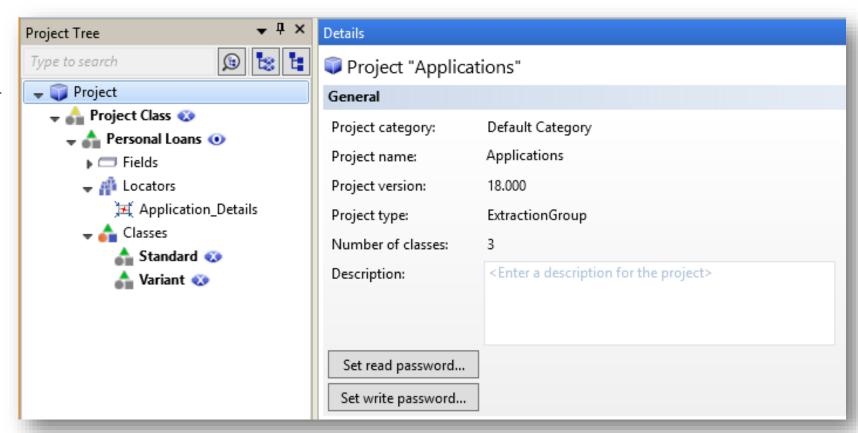
Details

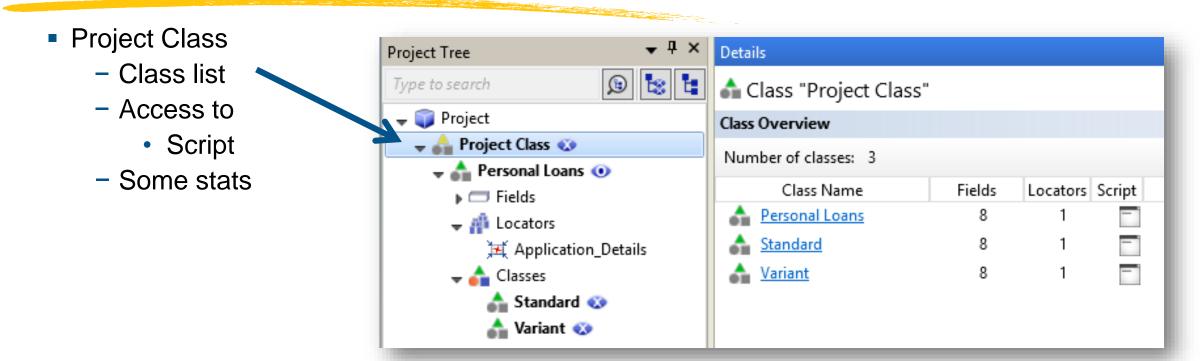


Project

Version ———

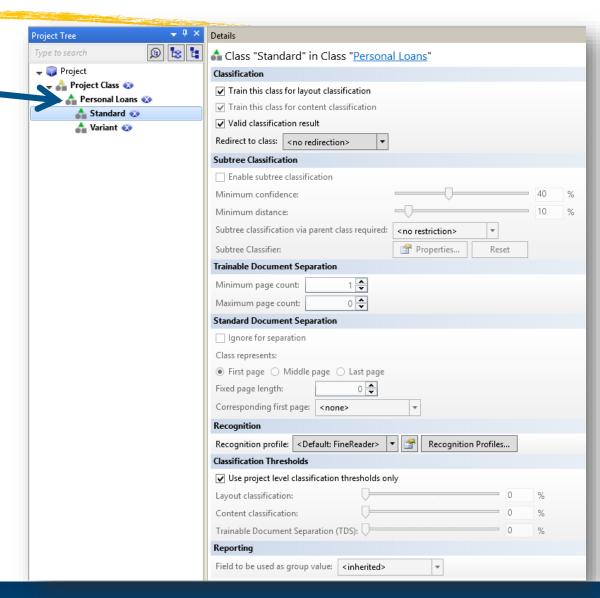
- # classes

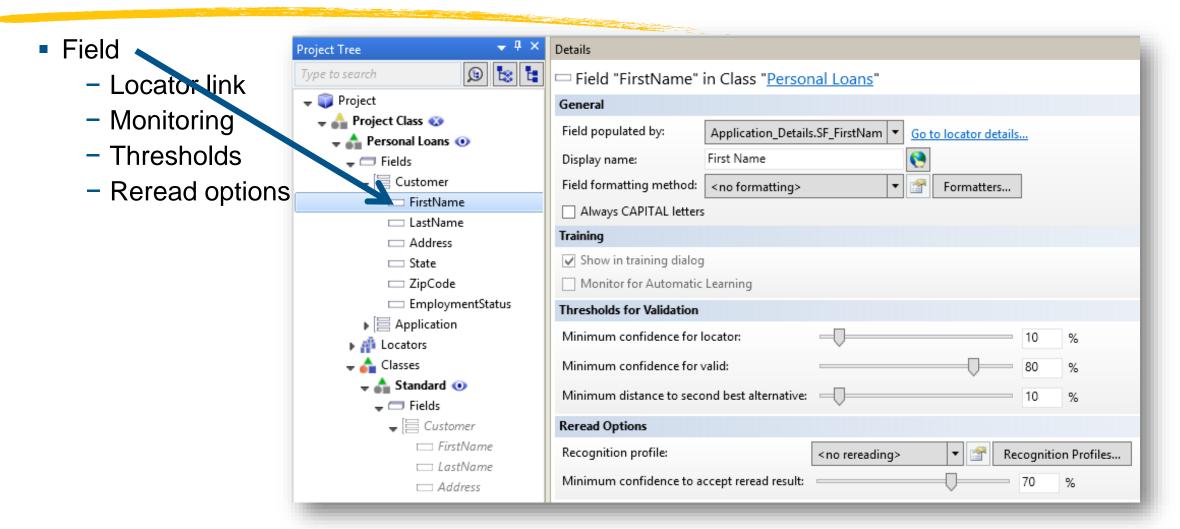


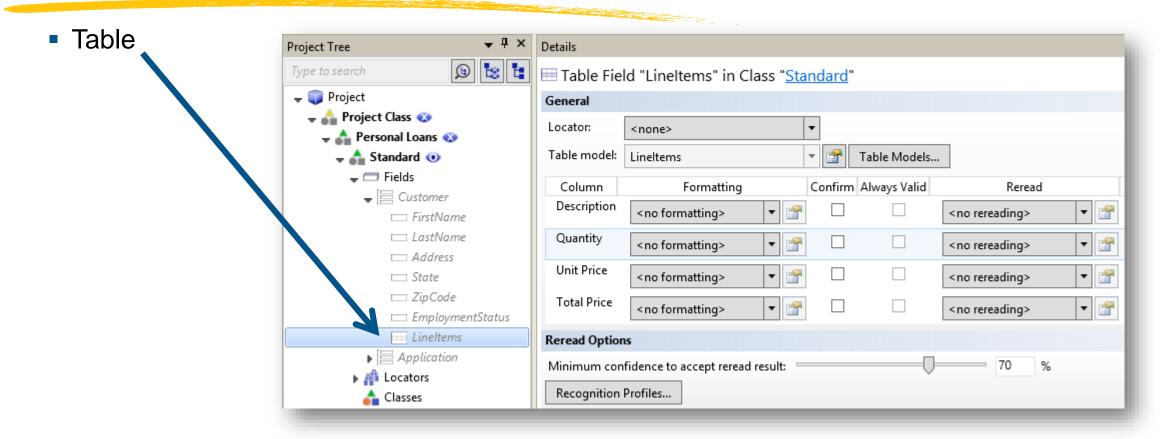




- Parent class link
- SubtreeClassification
- Thresholds
- Reporting

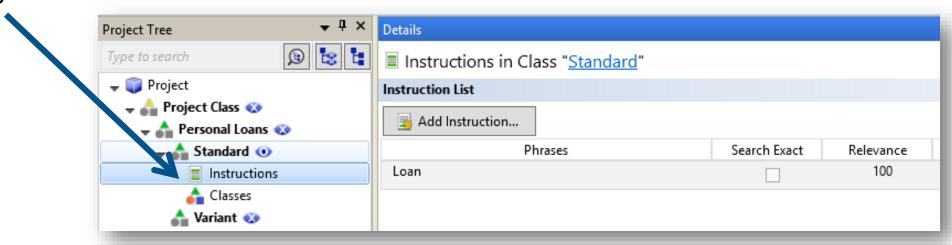






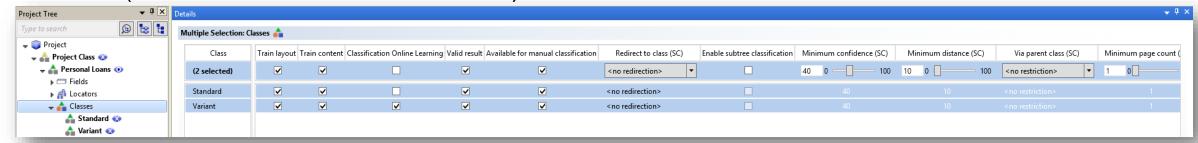
Locator Details Project Tree - Field links (a) (b) Type to search 其 Locator "Application_Details" in Class "Personal Loans" Project Settings 🚽 📤 Project Class 🐠 Definition Class: Personal Loans 📤 Personal Loans 🧿 Locator Method: Advanced Zone Locator | ▼ | 🌁 | Copy Method Tields Locators The locator is assigned to the following fields: FirstName <u>LastName</u> Address 🕳 🗂 Fields State ZipCode ☐ FirstName <u>EmploymentStatus</u> □ LastName <u>Amount</u>

Instructions

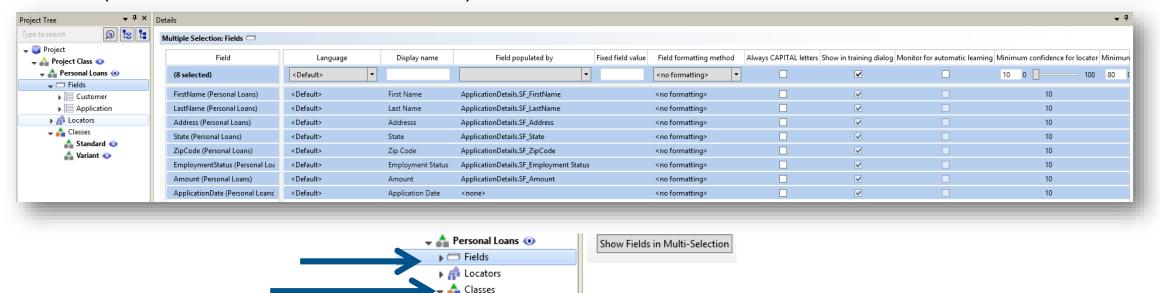


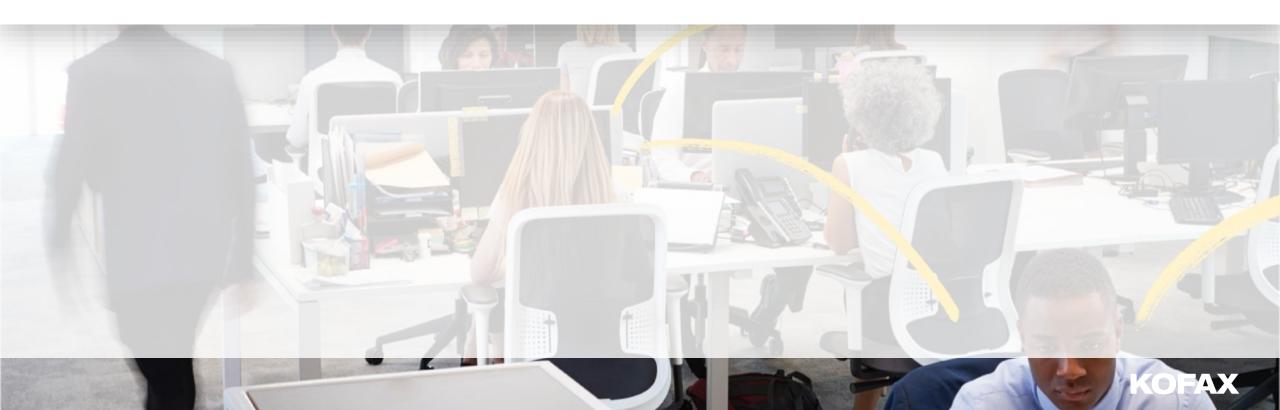
Project Tree – Summary nodes

Classes (Show Classes in Multi-Selection)

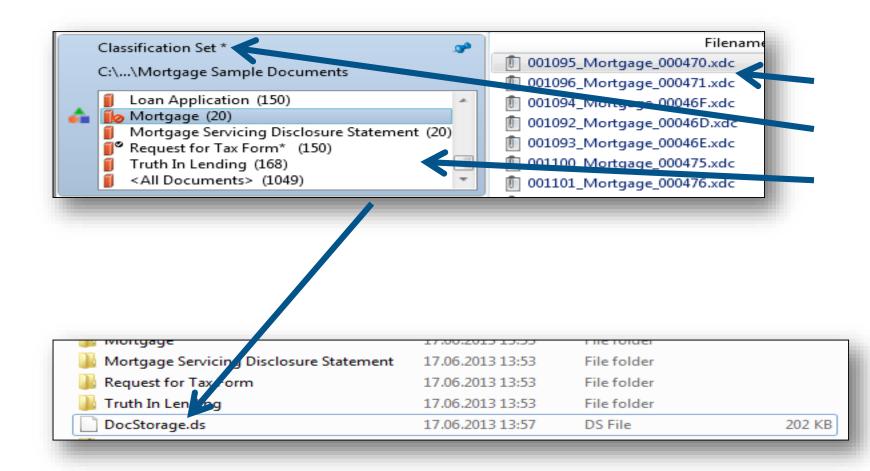


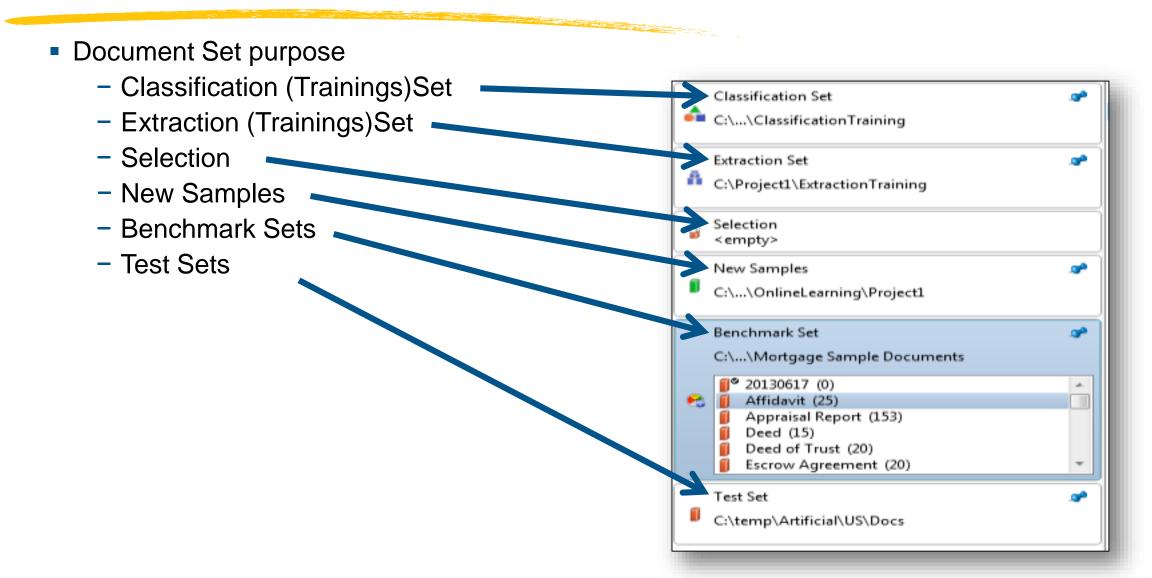
Fields (Show Fields in Multi-Selection)





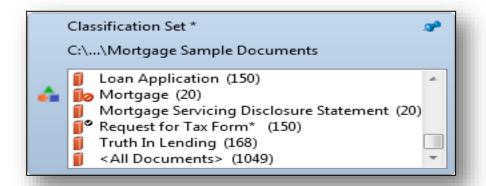
- What are Document Sets?
 - Manage your files
 - Specific purpose
 - Have subsets
 - In a database





- Document Sets
 - Modified (*)
 - Close
 - Reload
 - Add Subsets
 - Attach/Detach
 - Use as...
 - Note: When using a test set as training set it becomes external, it is not copied.
 - → Careful with deletion, docs are deleted in the external location. E.g.: Deleting a

class deletes training docs of class...



们 Close 们さ Reload

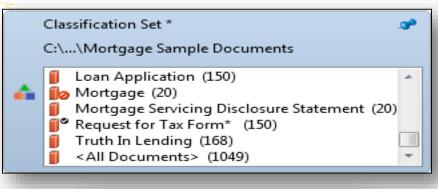
Create Document Subset

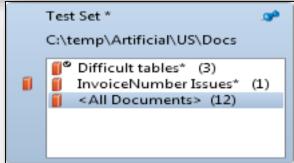
Detach Document Set from Project

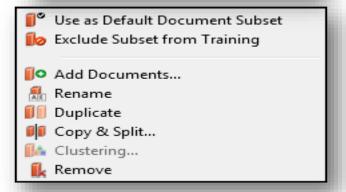
had Use as Classification Training Set

Use as Extraction Training Set

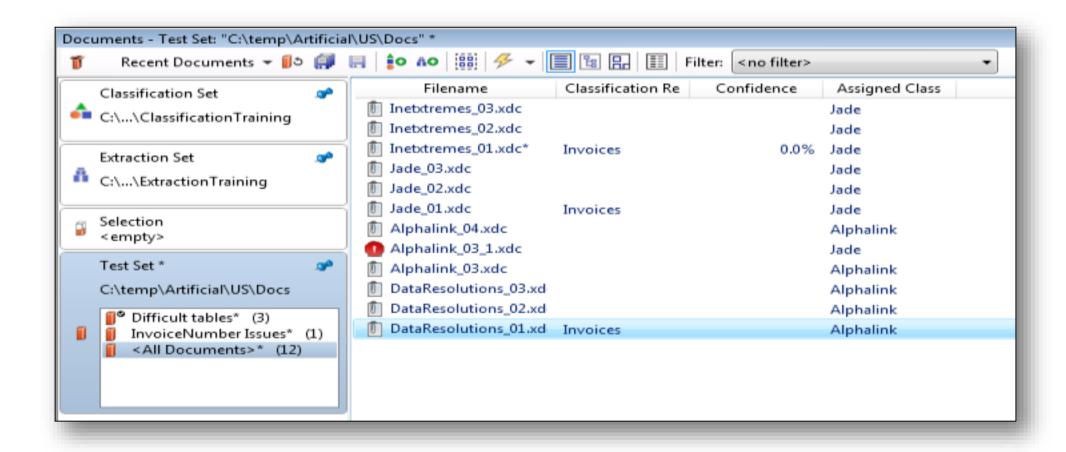
- Document Sets Subsets
 - Modified (*)
 - <All Documents>
 - Default
 - Exclude
 - Add documents
 - Rename
 - Duplicate
 - Copy&Split
 - Cluster
 - Remove







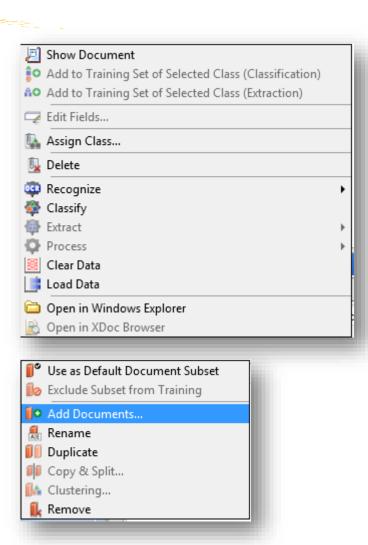
Document Sets – Documents



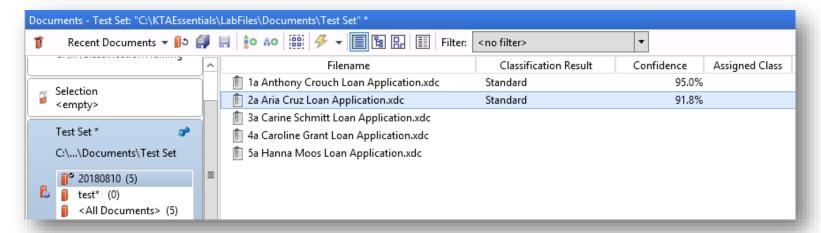
- Document Sets Documents
 - Display in viewer
 - Add to training sets
 - Assign a class
 - Recognition
 - Testing
 - Clear/Load data
 - Open in XDocBrowser or Explorer



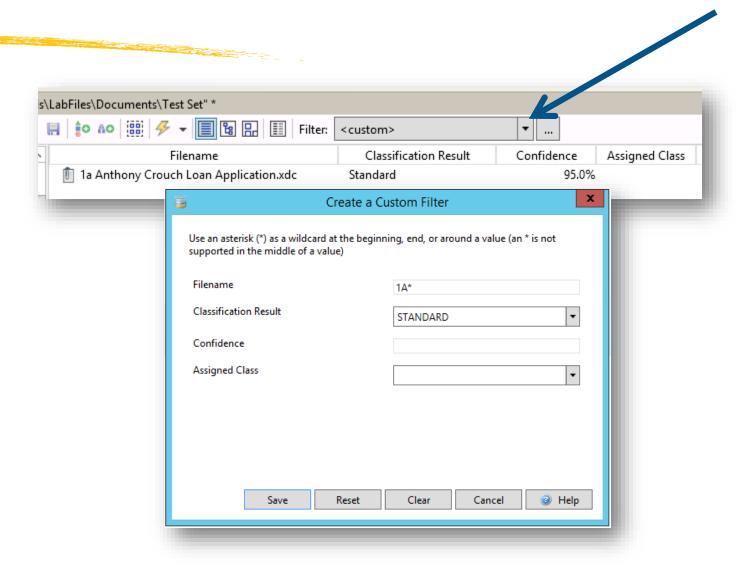
- Document Sets Documents continued
 - Drag and drop Copy
 - Drag and drop with Shift key Move
 - Delete from subset
 - Delete permanently
 - Adding
 - Copy & Split/Merge



- Document Sets Documents continued
 - Sort by any column
 - Handles deleted/corrupt docs more gracefully
 - Classification Result vs.
 Assigned Class
 - Classification Confidence
 - Field details
 - Saving
 - Filtering



- Document Sets Filtering
 - By Filename
 - By Classification Result
 - By Confidence
 - By Assigned Class
 - By Field value



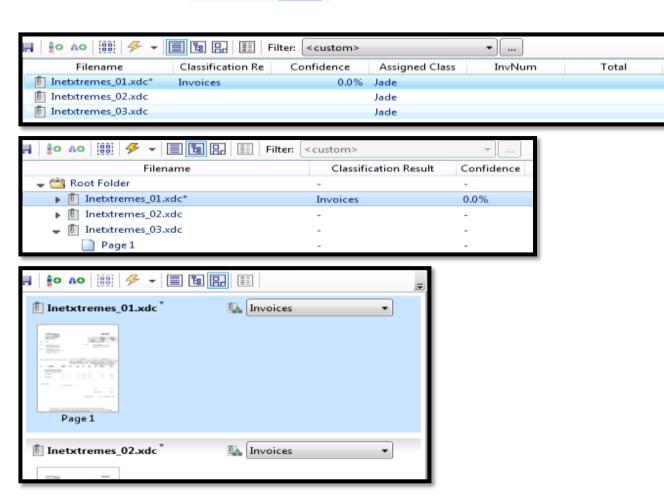
Document Sets – 3 view modes



Flat

Hierarchy

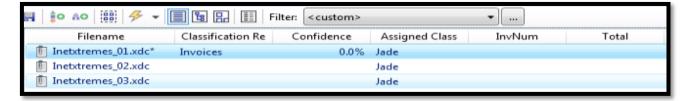
Thumbnails



Document Sets – 3 view modes



Flat

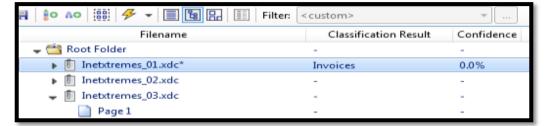


- Allows sorting by columns, filtering, display of additional columns
- Doesn't allow foldering, page details
- Available for all doc sets
- Use for: Basic mass document operations

Document Sets – 3 view modes



Hierarchy

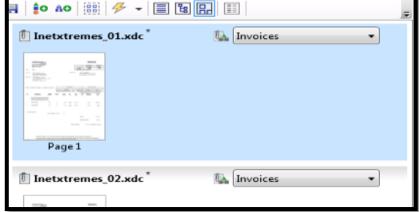


- Allows batch editing, custom document sorting, foldering
- Doesn't allow sorting by columns or filtering
- Available for test sets and benchmark sets on default subset
- Use for: Batch Editing, Foldering testing and Separation benchmarking

Document Sets – 3 view modes

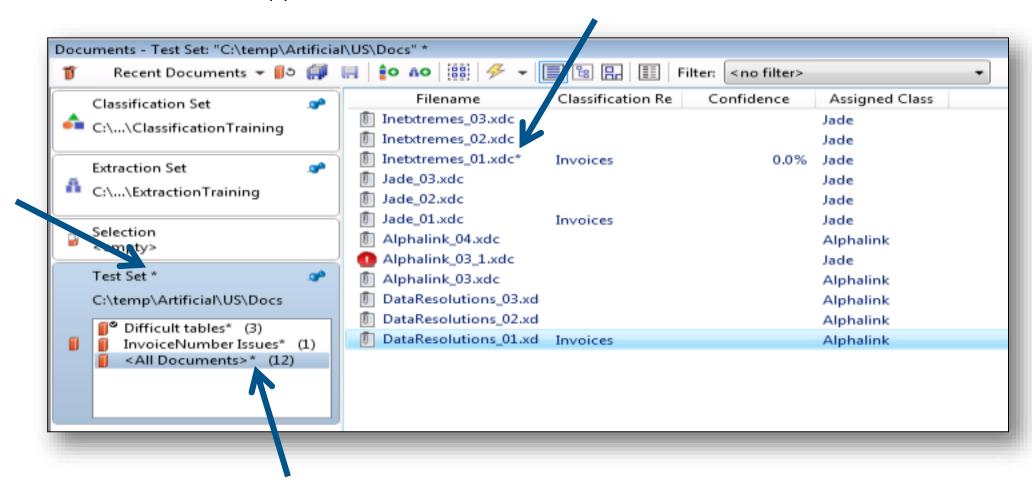


Thumbnails



- Allows batch editing, rotation, ignoring pages for training
- Doesn't allow sorting by columns, foldering
- Available for all doc sets
- Use for: Setting up separation training set

Document Set – Modified (*)



- Document Set Saving
 - Save document

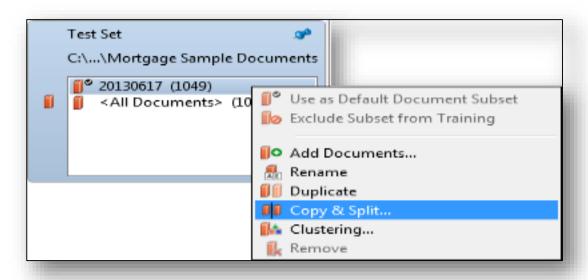


- If only document data is modified
- Works on multi-selection
- Save all

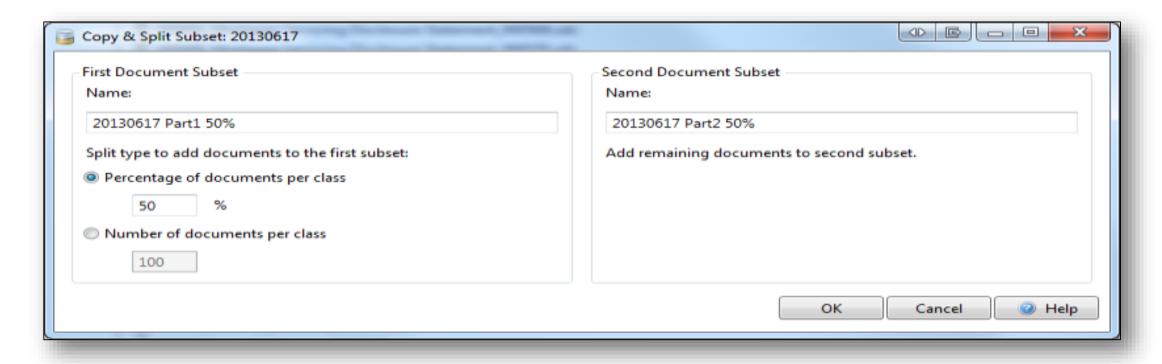
T Recent Documents ▼ 🌓 🗐 🔚 🚦 🏚 👭 🛒 💯 🖫 🔠

- If Document Set is modified
- If Document subset is modified
- If document(s) is/are structurally changed

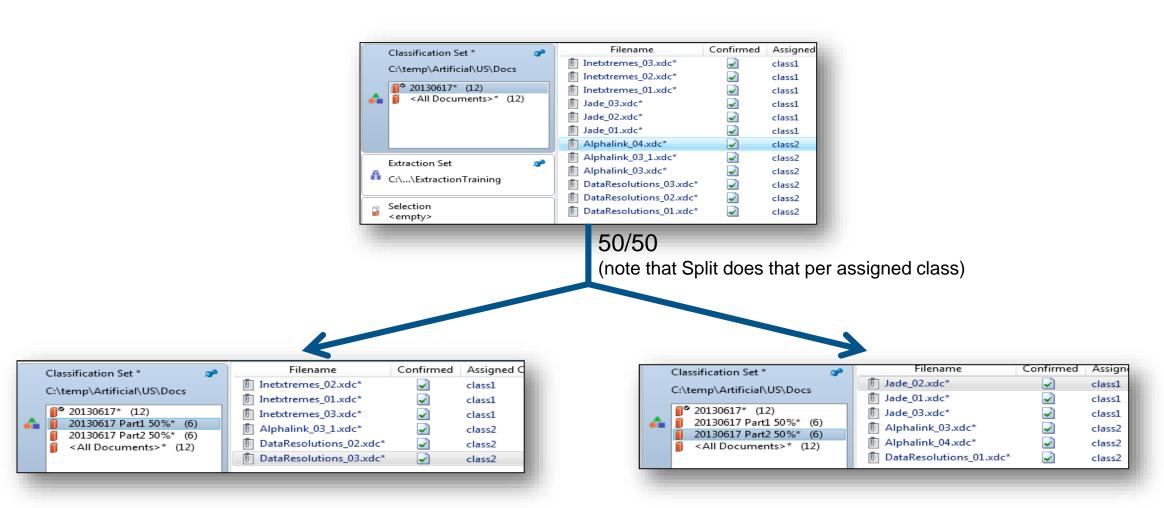
Document Set – Splitting subsets



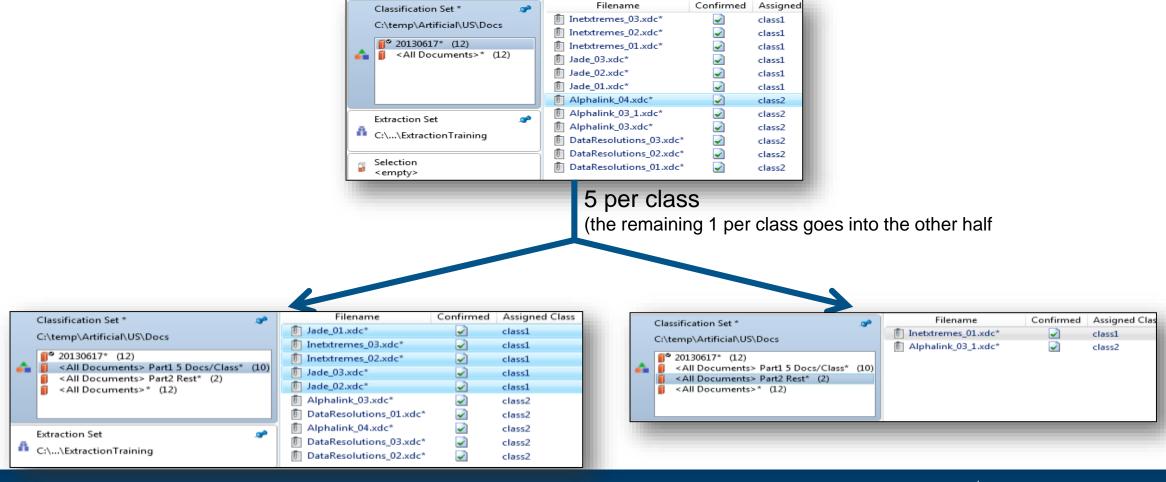
- Document Set Splitting subsets
 - By percentage
 - By absolute number

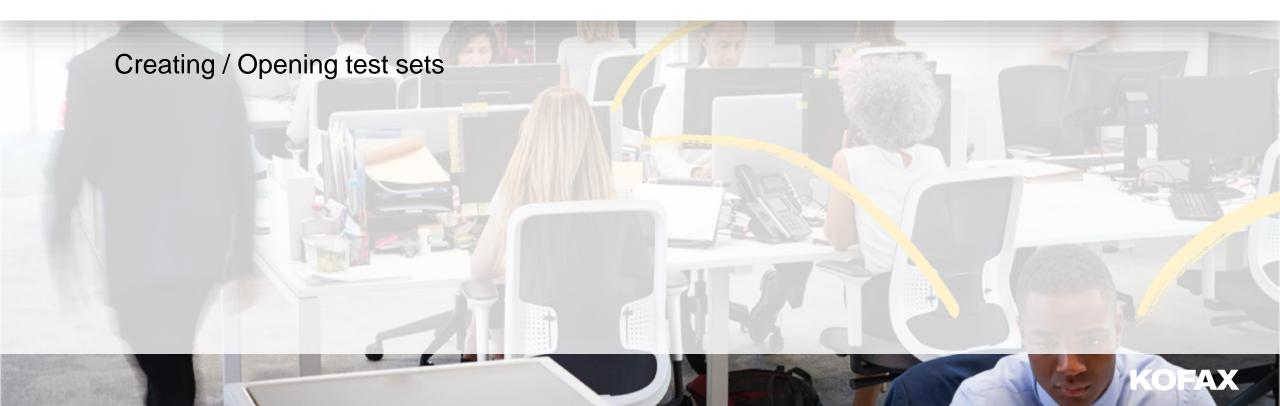


Document Set – Splitting subsets - Example

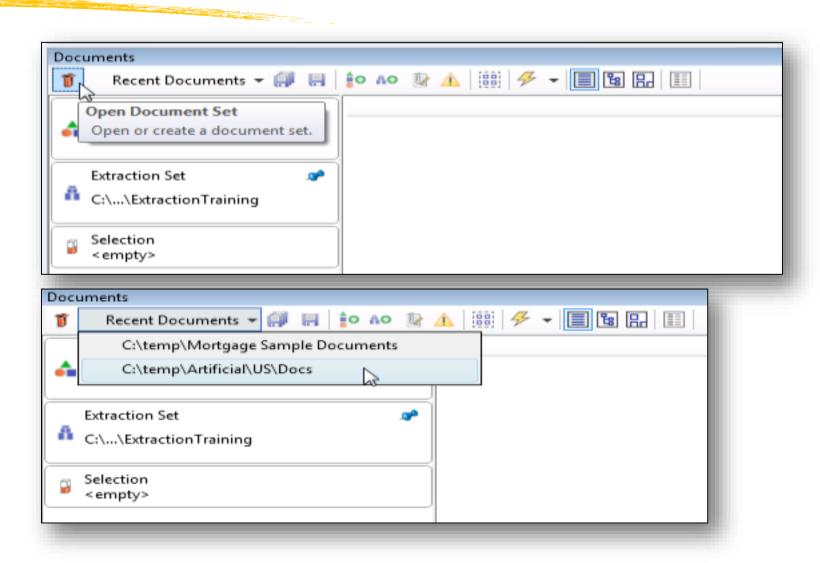


Document Set – Splitting subsets - Example

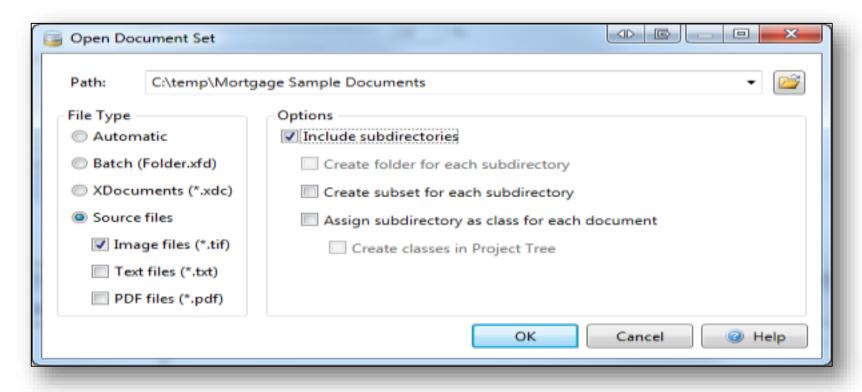




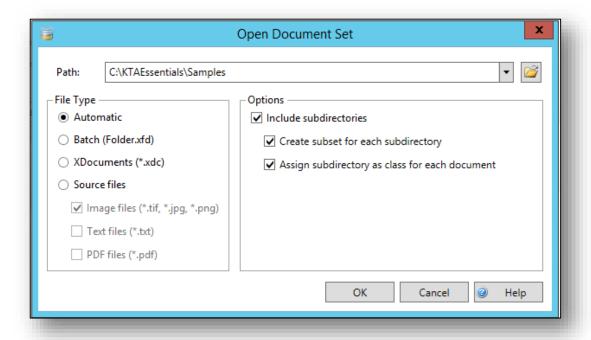
- Opening Document Sets
 - New
 - From recent list



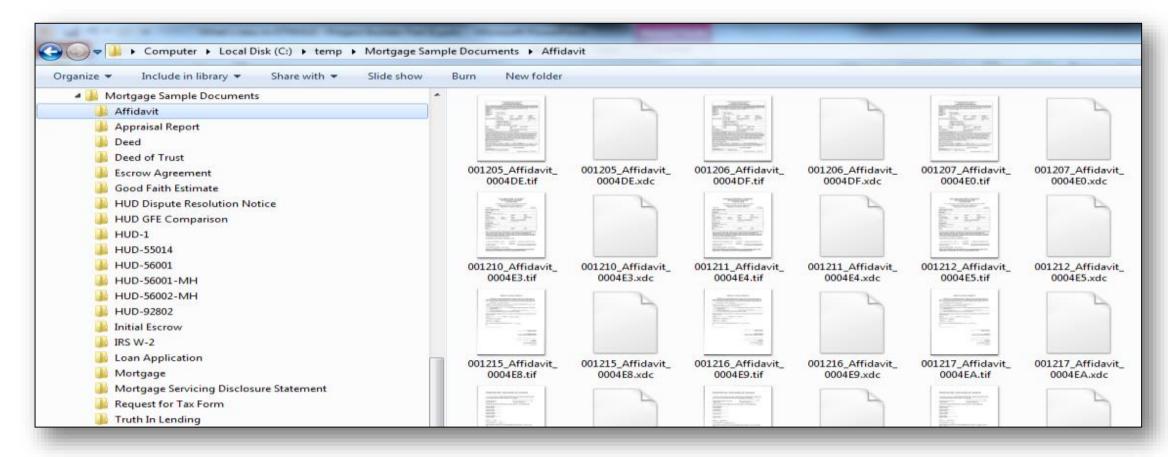
- Opening Document Sets
 - File types have not changed



- Opening Document Sets Options
 - Recursive or not
 - Create subsets for each directory
 - Assign class and create class

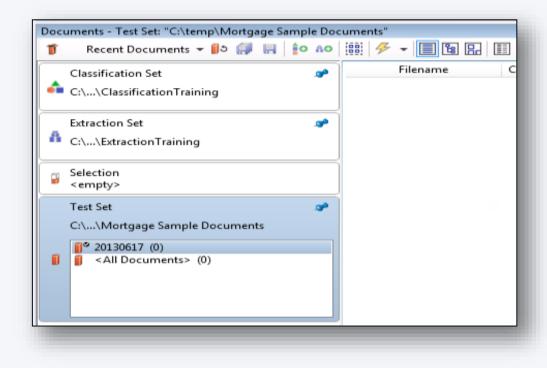


Opening Document Sets – Options Example

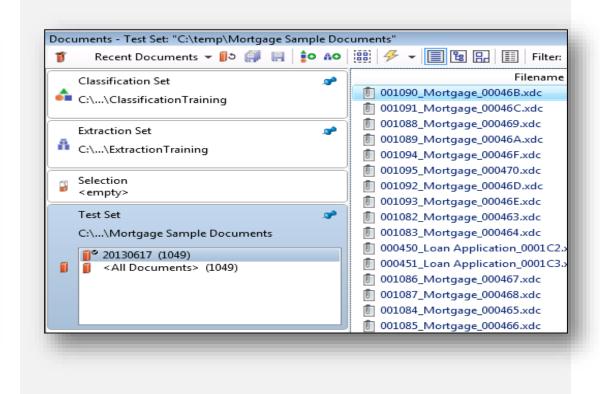


Opening Document Sets – Options Example

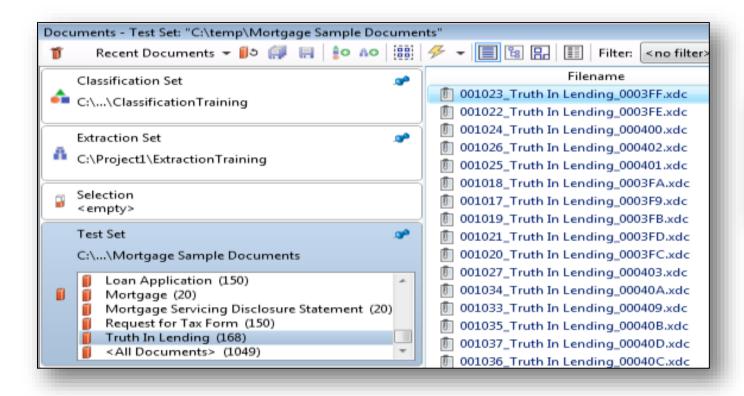
Not include subdirectories:



Include subdirectories:



- Opening Document Sets Options Example
 - Include subdirectories, create subset per directory:



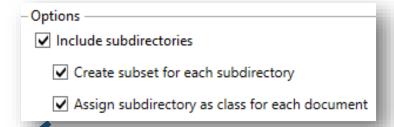
Options

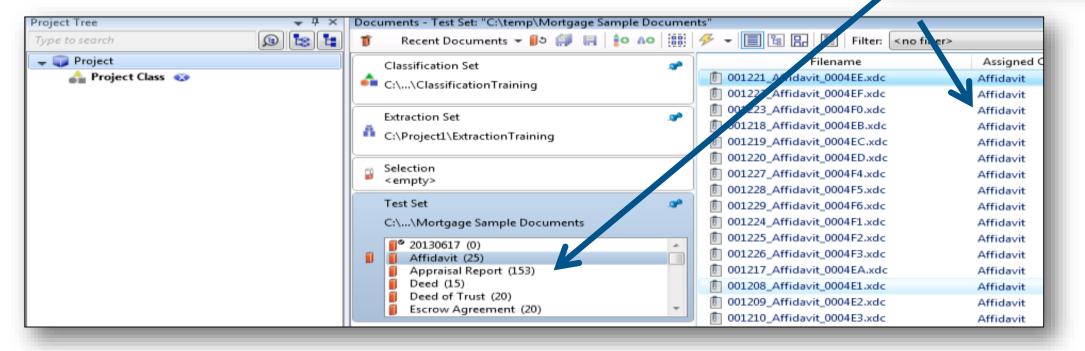
✓ Include subdirectories

✓ Create subset for each subdirectory

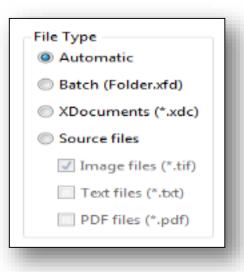
✓ Assign subdirectory as class for each document

- Opening Document Sets Options Example
 - Include subdirectories, create subset per directory, assign class:





- Opening Document Sets file types
 - Load old separation benchmarks as XFolders
 converted to Document set (DB)
 - Can multi-select source file types



- Opening Document Sets
 - Only one document set per directory (including hierarchy)
 - If a Document Set already exists, Selecting "Source" files" overwrites it

