

Organize

Section 3-1

> Step

1. Navigate to (root) > Global Resources > Separation Profiles
2. Create a new separation profile
3. Give it a name, like Invoices Separation

> Step

Change the following properties:

1. Set Provider to Control Sheet Separation

2. Set Delete All Separators to True

> Step

1. Navigate to (root) > Batch Processing > Processes > Working > Invoices Process
2. Add a new step
3. Set the Activity Type property of the new step to Separate
4. Set the Separation Profile to the new Invoices Separation profile we created
5. Save and Publish.

> Step

1. Navigate to (root) > Batch Processing > Batches > Production > Invoices Process.
2. Make sure the batch is paused
3. Right click on the Invoices Batch and select Update Process....
4. Set Target Step to Separate.
5. Click Execute.

> Step

1. Resume the batch
2. Click Process

Section 3-2

> Step

1. Navigate to (root) > Content Models.
2. Right click on Content Models and select Add > Content Model....
3. Name it **Invoices** .

> Step

1. Right click on the new Invoices Content Model and select Contents > Add Multiple Items....
2. In the Contents • Add Multiple Items window, set Item Type to Document Type
3. Edit the Item Names property and type out the names of each vendor
 - Acme
 - Enid
 - Express
 - Spartan
 - Standard
4. Click Execute to complete

> Step

1. Navigate to (root) > Batch Processing > Batches > Test > Production Clones > Invoices Process > Invoices Batch
2. Right click on Invoices Batch and select Delete

> Step

1. Navigate to (root) > Batch Processing > Batches > Production > Invoices Process > Invoices Batch
2. Click Clone To Test

> Step

1. Navigate to (root) > Content Models > Invoices
2. Right click on Invoices and select Create Data Model
3. Right click on Invoices and select Create Local Resources Folder





> Step

1. On the Invoices Content Model in the General section, set the Classification Method property to Lexical
2. Still in the General section, navigate to Classification Method > Text Feature Extractor > Type
3. Set the Type property to Reference
4. Set the Referenced Extractor property to the Data Extraction > Downloads > Features > Words (Stemmed) Data Type

> Step

1. Click on the Classification Testing tab
2. Select Folder (1)
3. In the toolbar, click on the Train Document button
4. Select the Acme Document Type from the list
5. In the toolbar, click on the Classify Batch button

> Step

1. Train the other four vendors:
 - Folder (2)  Standard (2)
 - Folder (3)  Express (3)
 - Folder (4)  Spartan (4)
 - Folder (5)  Enid (5)
2. In the toolbar, click on the Classify Batch button

Section 3-3

> Step

1. Navigate to (root) > Batch Processing > Processes > Working > Invoices Process
2. Add a new step
3. Set the Activity Type property of the new step to Classify
4. Set the Content Model Scope to our Invoices Content Model

> Step

1. Add a new step
2. Set the Activity Type property of the new step to Classify Review
3. Set the Classification Viewer Settings > Content Model Scope to our Invoices Content Model
4. Save and Publish.

> Step

1. Navigate to (root) > Batch Processing > Batches > Production > Invoices Process
2. Make sure the batch is paused
3. Right click on the Invoices Batch and select Update Process....
4. Set Target Step to Classify.
5. Click Execute.

> Step

1. Resume the batch
2. Click Process

> Step

1. After the Classify step has completed, click Process to start the Classify Review step.
2. In Grooper Classify Review, right click on Folder (18) and select Assign Content Type
3. Select the Enid Document Type from the list and click OK
4. In the toolbar, click on the Complete Task button to finish this activity