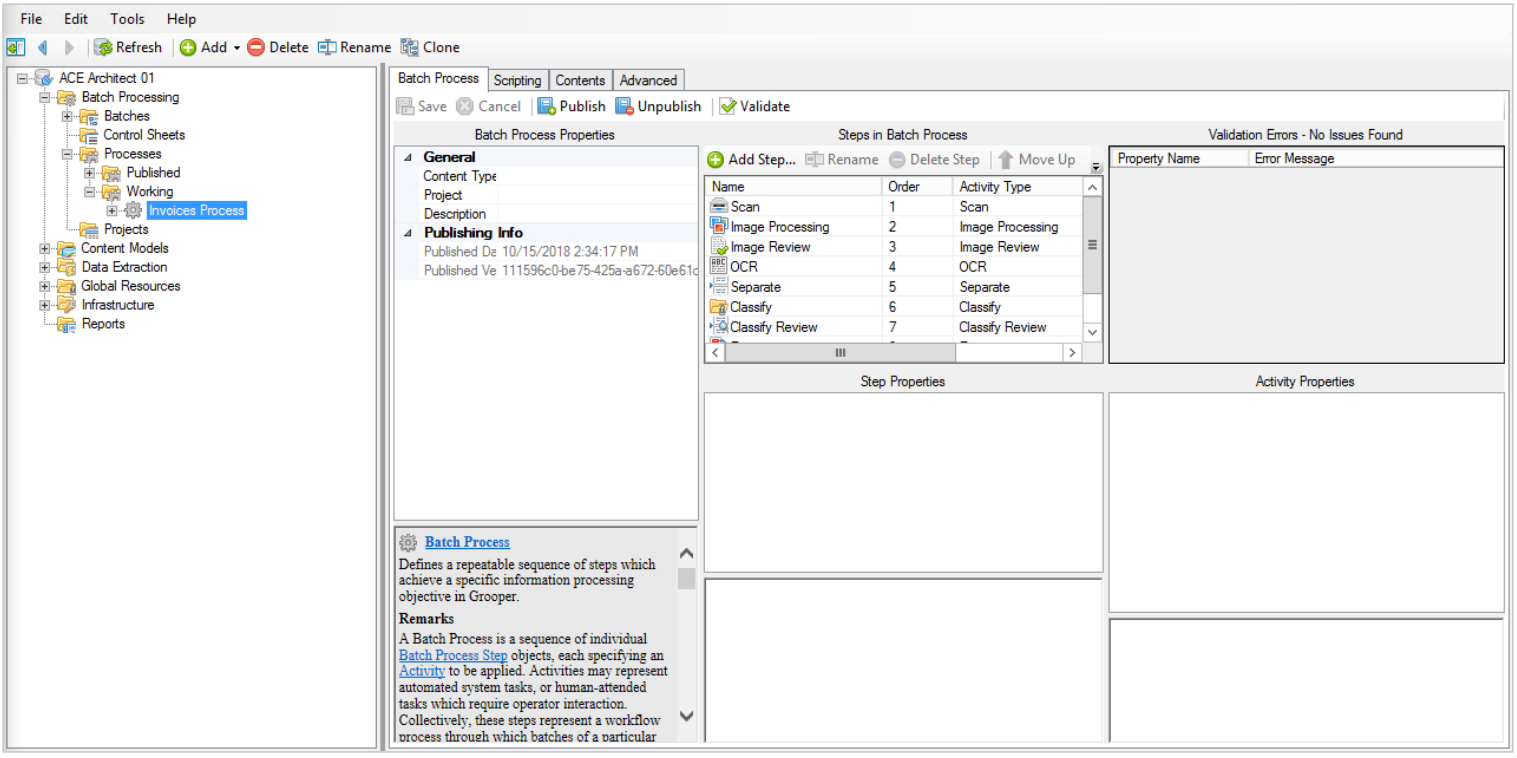
Deliver

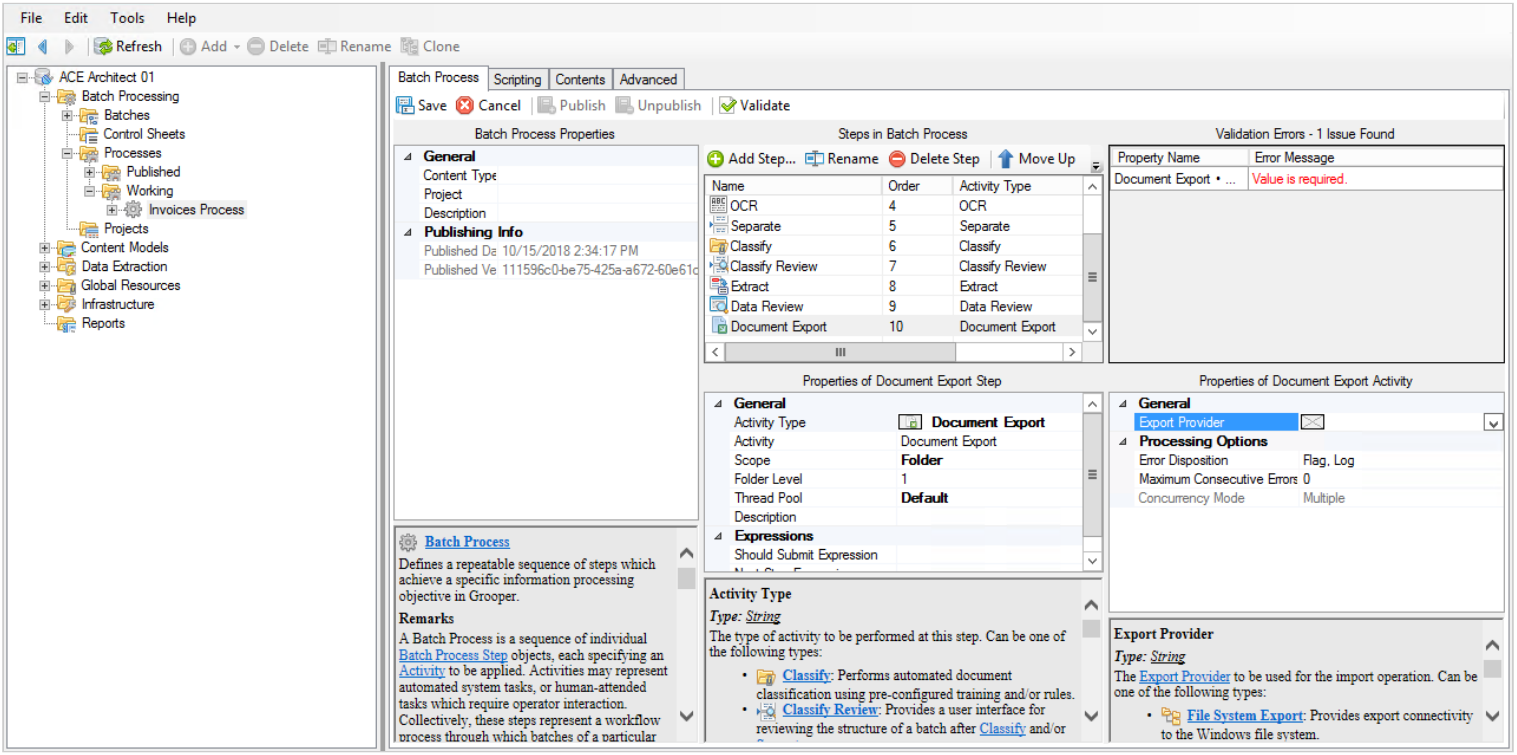
Document Export

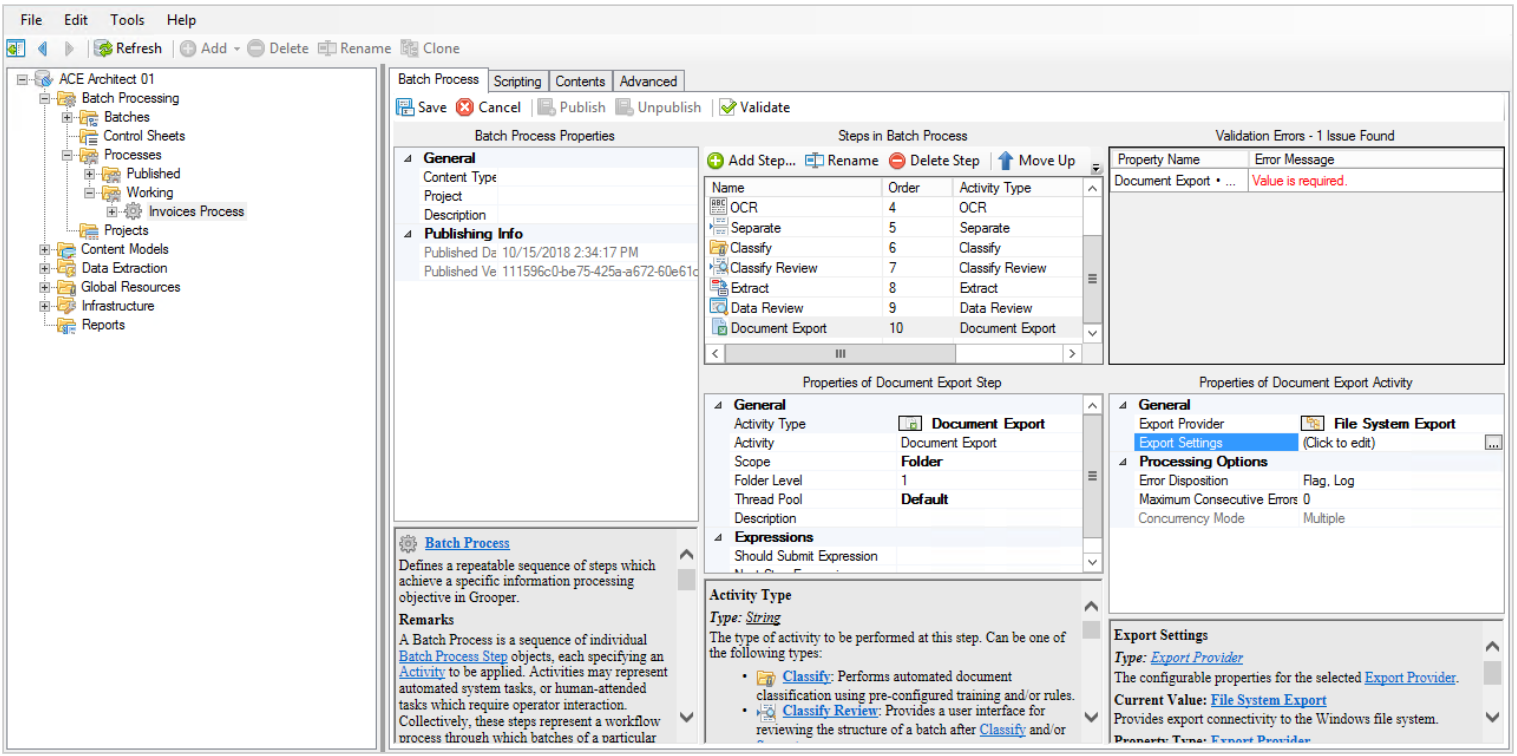
Adding and configuring Document Export

> Step 1

1. Navigate to (root) > Batch Processing > Batches > Production > Invoices Process
2. Add a new step
3. Set the Activity Type property of the new step to Document Export
4. Set the Export Provider property to File System Export
5. Click on the Export Settings property to edit its settings




File Edit Tools Help
Refresh Add Delete Rename Clone
ACE Architect 01
Batch Processing
Batches
Control Sheets
Processes
Published
Working
Invoices Process
Projects
Content Models
Data Extraction
Global Resources
Infrastructure
Reports
Batch Process Scripting Contents Advanced
Save Cancel Publish Unpublish Validate
Batch Process Properties
General
Content Type
Project
Description
Publishing Info
Published Da 10/15/2018 2:34:17 PM
Published Ve 111596c0-be75-425a-a672-60e61c
Steps in Batch Process
Add Step... Rename Delete Step Move Up
Name Order Activity Type
OCR 4 OCR
Separate 5 Separate
Classify 6 Classify
Classify Review 7 Classify Review
Extract 8 Extract
Data Review 9 Data Review
Document Export 10 Document Export
Validation Errors - 1 Issue Found
Property Name Error Message
Document Export • ... Value is required.
Properties of Document Export Step
General
Activity Type Document Export
Activity Document Export
Scope Folder
Folder Level 1
Thread Pool Default
Description
Expressions
Should Submit Expression
Properties of Document Export Activity
General
Export Provider
Processing Options
Error Disposition Flag, Log
Maximum Consecutive Errors 0
Concurrency Mode Multiple
Batch Process
Defines a repeatable sequence of steps which achieve a specific information processing objective in Grooper.
Remarks
A Batch Process is a sequence of individual Batch Process Step objects, each specifying an Activity to be applied. Activities may represent automated system tasks, or human-attended tasks which require operator interaction. Collectively, these steps represent a workflow process through which batches of a particular
Activity Type
Type: String
The type of activity to be performed at this step. Can be one of the following types:
Classify: Performs automated document classification using pre-configured training and/or rules.
Classify Review: Provides a user interface for reviewing the structure of a batch after Classify and/or
Export Provider
Type: String
The Export Provider to be used for the import operation. Can be one of the following types:
File System Export: Provides export connectivity to the Windows file system.


File Edit Tools Help
Refresh Add Delete Rename Clone
ACE Architect 01
Batch Processing
Batches
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Processes
Published
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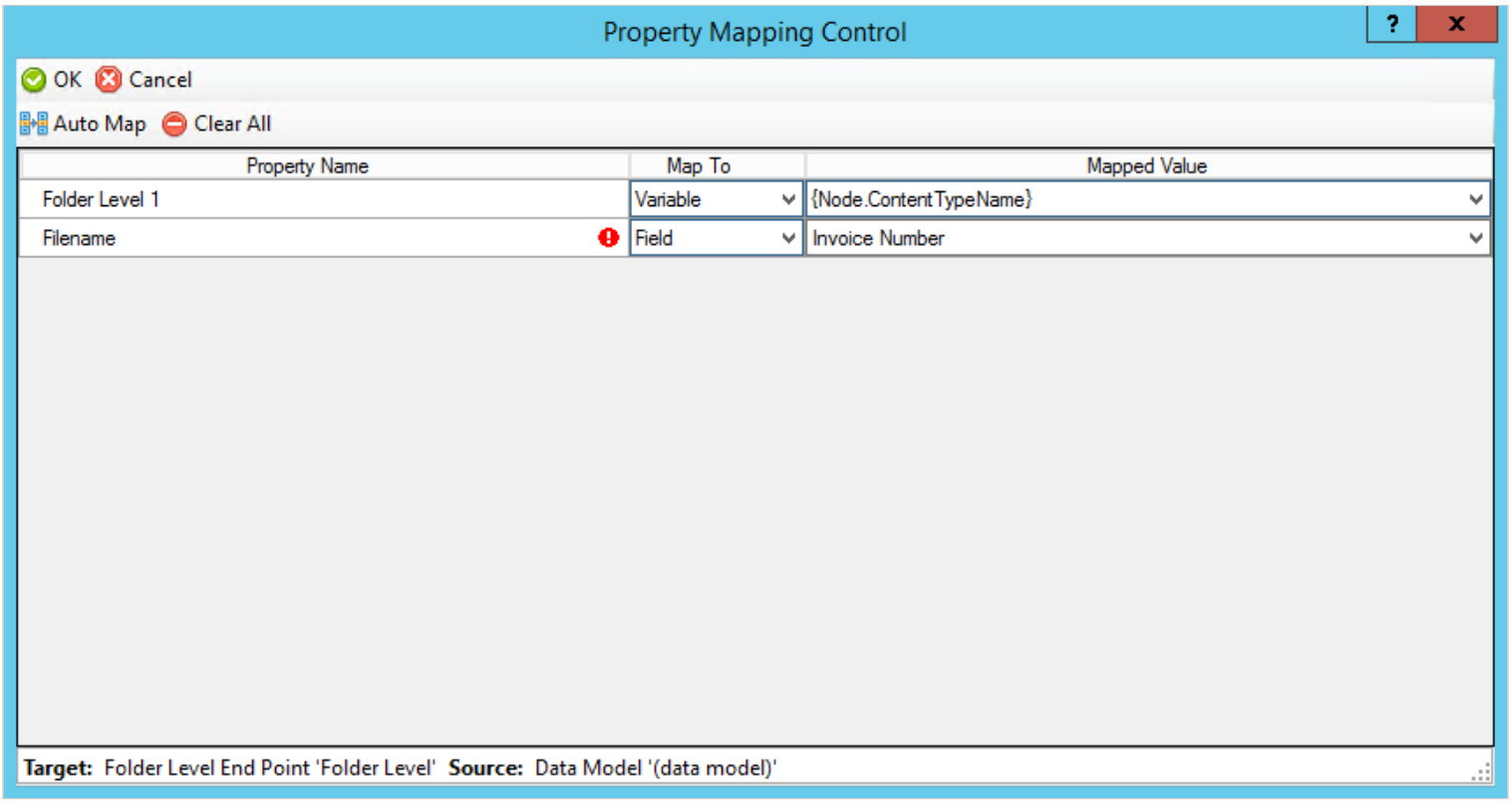
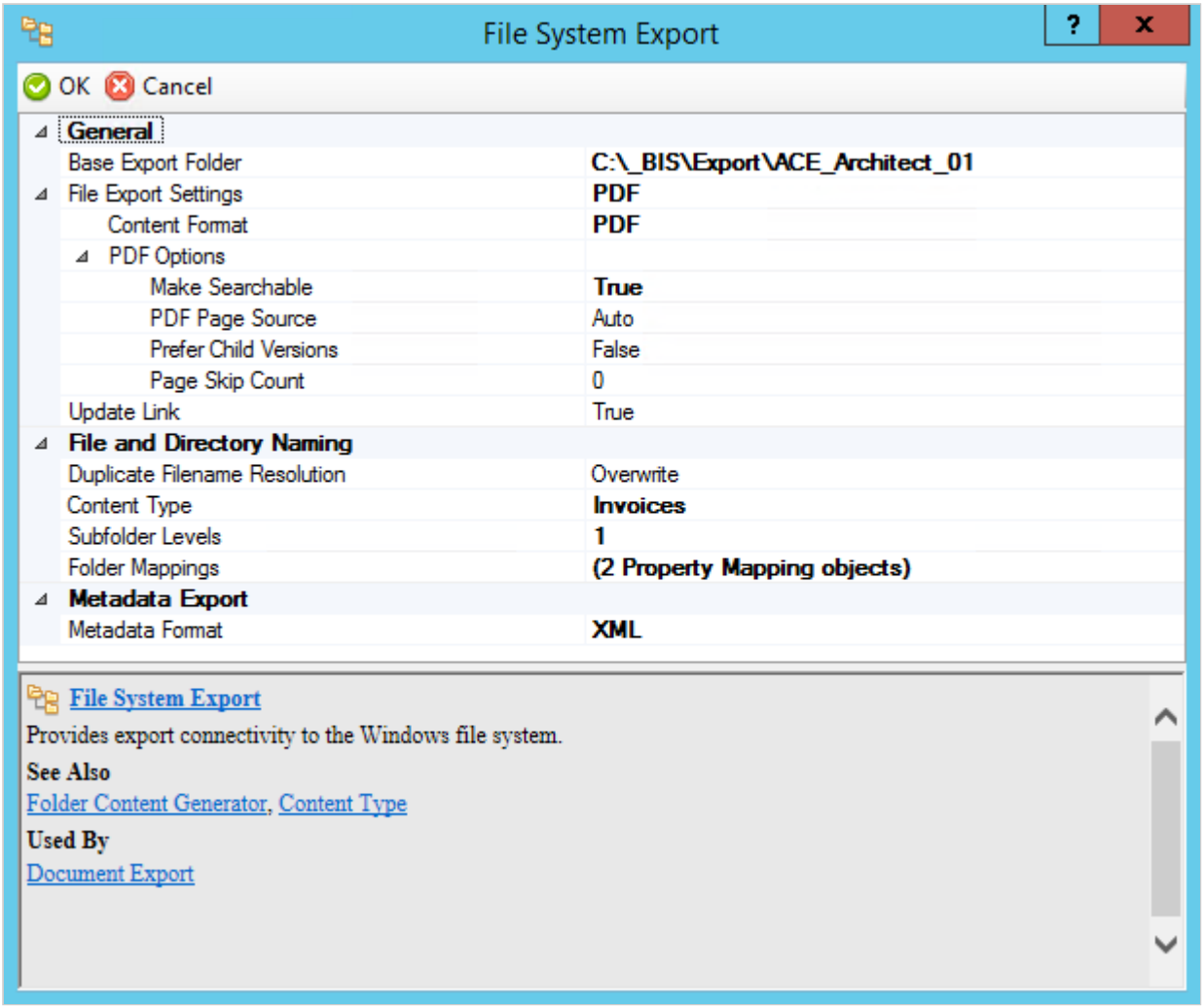
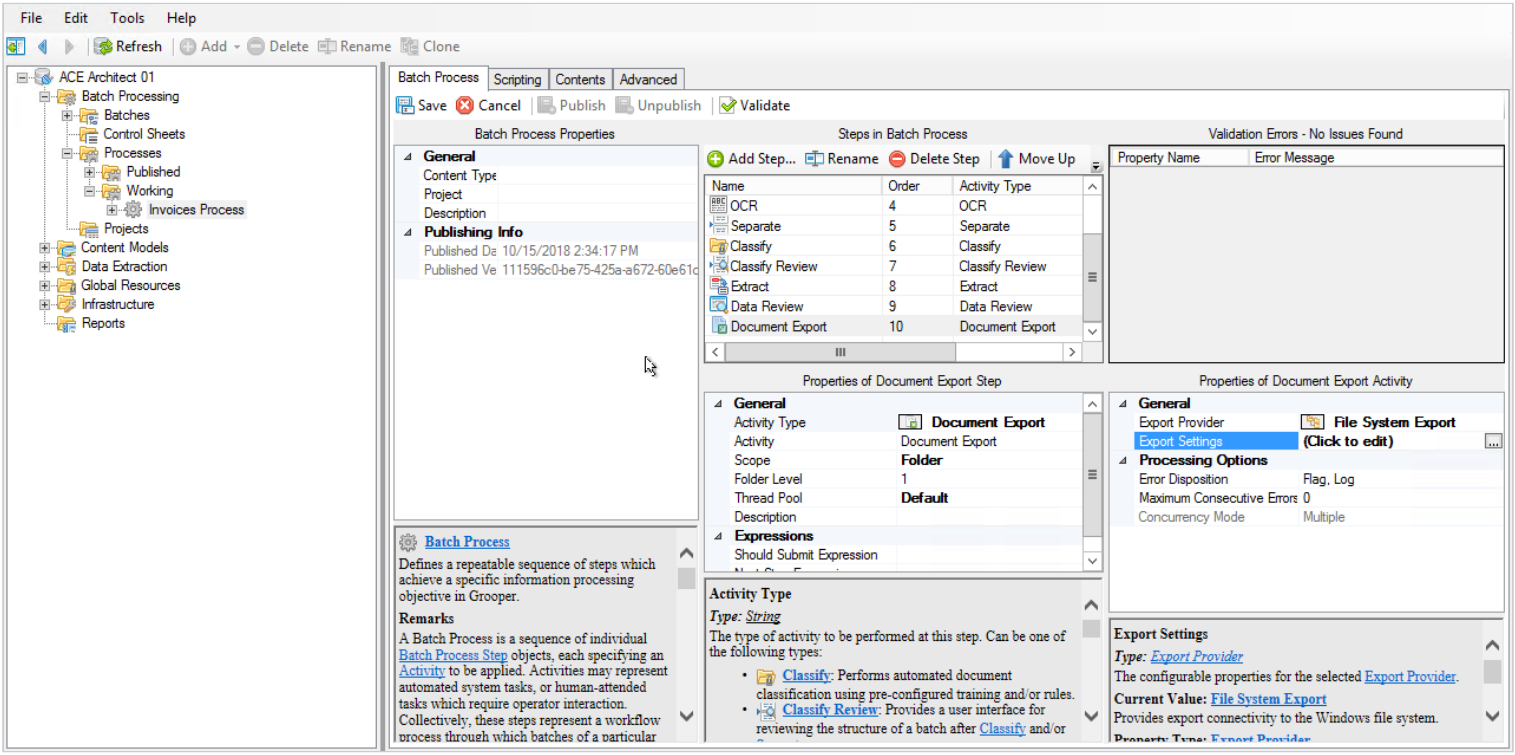
Content Models
Data Extraction
Global Resources
Infrastructure
Reports
Batch Process Scripting Contents Advanced
Save Cancel Publish Unpublish Validate
Batch Process Properties
General
Content Type
Project
Description
Publishing Info
Published Da 10/15/2018 2:34:17 PM
Published Ve 111596c0-be75-425a-a672-60e61c
Steps in Batch Process
Add Step... Rename Delete Step Move Up
Name Order Activity Type
OCR 4 OCR
Separate 5 Separate
Classify 6 Classify
Classify Review 7 Classify Review
Extract 8 Extract
Data Review 9 Data Review
Document Export 10 Document Export
Validation Errors - 1 Issue Found
Property Name Error Message
Document Export • ... Value is required.
Properties of Document Export Step
General
Activity Type Document Export
Activity Document Export
Scope Folder
Folder Level 1
Thread Pool Default
Description
Expressions
Should Submit Expression
Properties of Document Export Activity
General
Export Provider File System Export
Export Settings (Click to edit)
Processing Options
Error Disposition Flag, Log
Maximum Consecutive Errors 0
Concurrency Mode Multiple
Batch Process
Defines a repeatable sequence of steps which achieve a specific information processing objective in Grooper.
Remarks
A Batch Process is a sequence of individual Batch Process Step objects, each specifying an Activity to be applied. Activities may represent automated system tasks, or human-attended tasks which require operator interaction. Collectively, these steps represent a workflow process through which batches of a particular
Activity Type
Type: String
The type of activity to be performed at this step. Can be one of the following types:
Classify: Performs automated document classification using pre-configured training and/or rules.
Classify Review: Provides a user interface for reviewing the structure of a batch after Classify and/or
Export Settings
Type: Export Provider
The configurable properties for the selected Export Provider.
Current Value: File System Export
Provides export connectivity to the Windows file system.

Step 2

1. In the File System Export window, in the General section:
    a. Set the Base Export Folder property to a path where the files can be exported
    b. Set the File Export Settings > Content Format property to `PDF`
    c. Set the File Export Settings > PDF Options > Make Searchable property to `True`
2. In the File and Directory Naming section:
    a. Set the Content Type property to the `Invoices` Content Model
    b. Set the Subfolder Levels property to `1`
    c. Edit the Folder Mappings property:
        i. For Folder Level 1, set Map To to `Variable` and Mapped Value to `{Node.ContentTypeName}`
        ii. For Filename, set Map To to `Field` and Mapped Value to `Invoice Number`
3. In the Metadata Export section:
    a. Set the Metadata Format property to `XML`
4. Click OK to close the window
5. Save and Publish


Property Mapping Control
OK
Cancel
Auto Map
Clear All
Property Name
Map To
Mapped Value
Folder Level 1
Variable
{Node.ContentTypeName}
Filename
Field
Invoice Number
Target: Folder Level End Point 'Folder Level' Source: Data Model '(data model)'

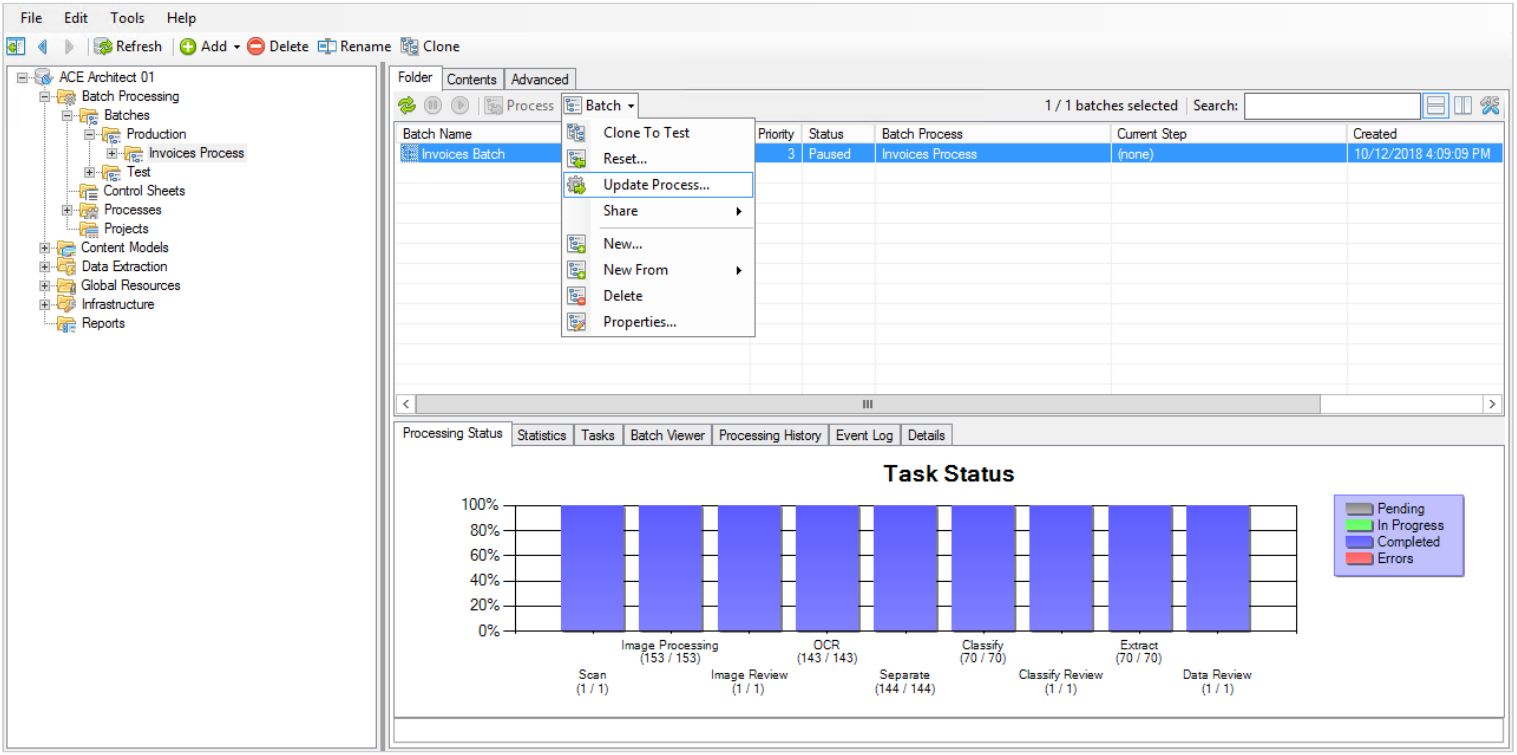

File System Export
OK
Cancel
General
Base Export Folder
C:_BIS\Export\ACE_Architect_01
File Export Settings
PDF
Content Format
PDF
PDF Options
Make Searchable
True
PDF Page Source
Auto
Prefer Child Versions
False
Page Skip Count
0
Update Link
True
File and Directory Naming
Duplicate Filename Resolution
Overwrite
Content Type
Invoices
Subfolder Levels
1
Folder Mappings
(2 Property Mapping objects)
Metadata Export
Metadata Format
XML
File System Export
Provides export connectivity to the Windows file system.
See Also
Folder Content Generator, Content Type
Used By
Document Export

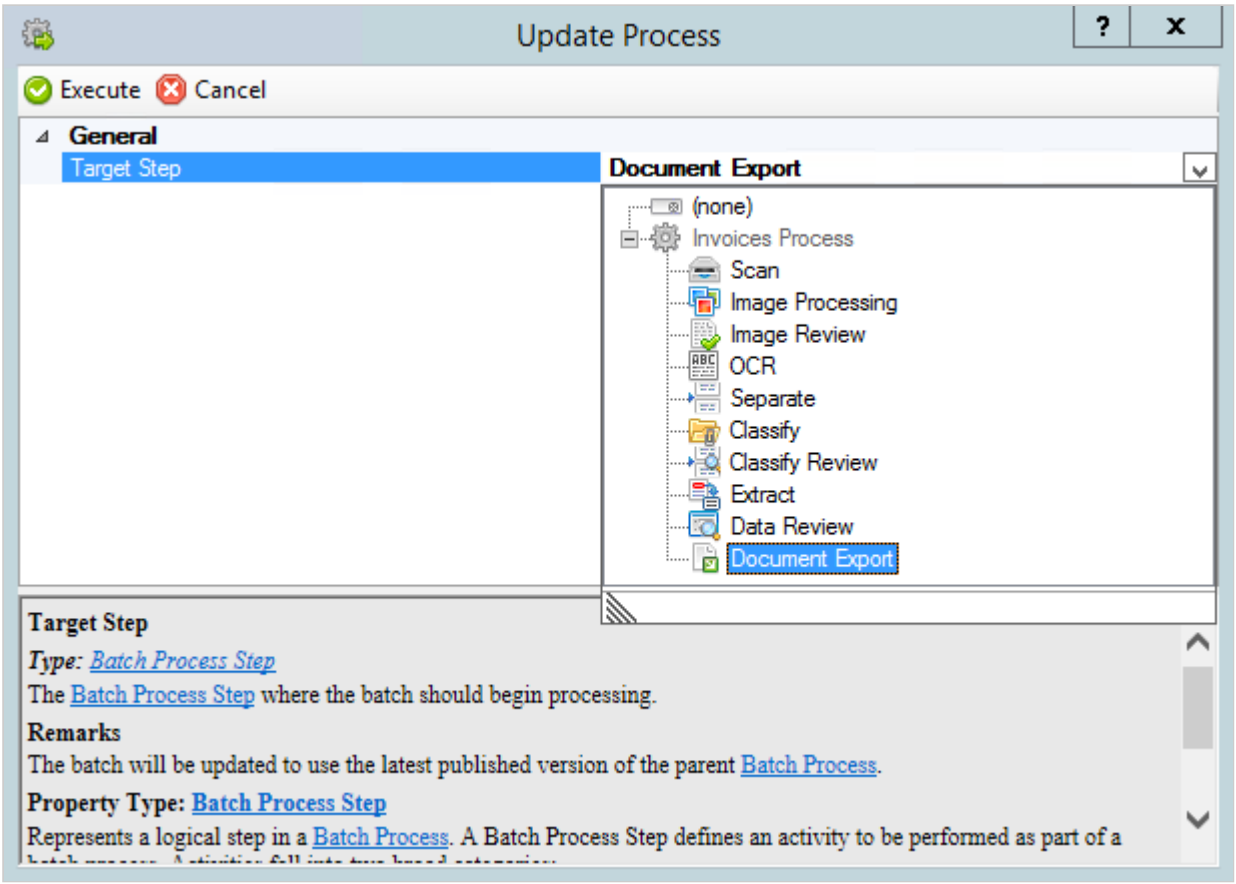


Updating the production batch

Step 1

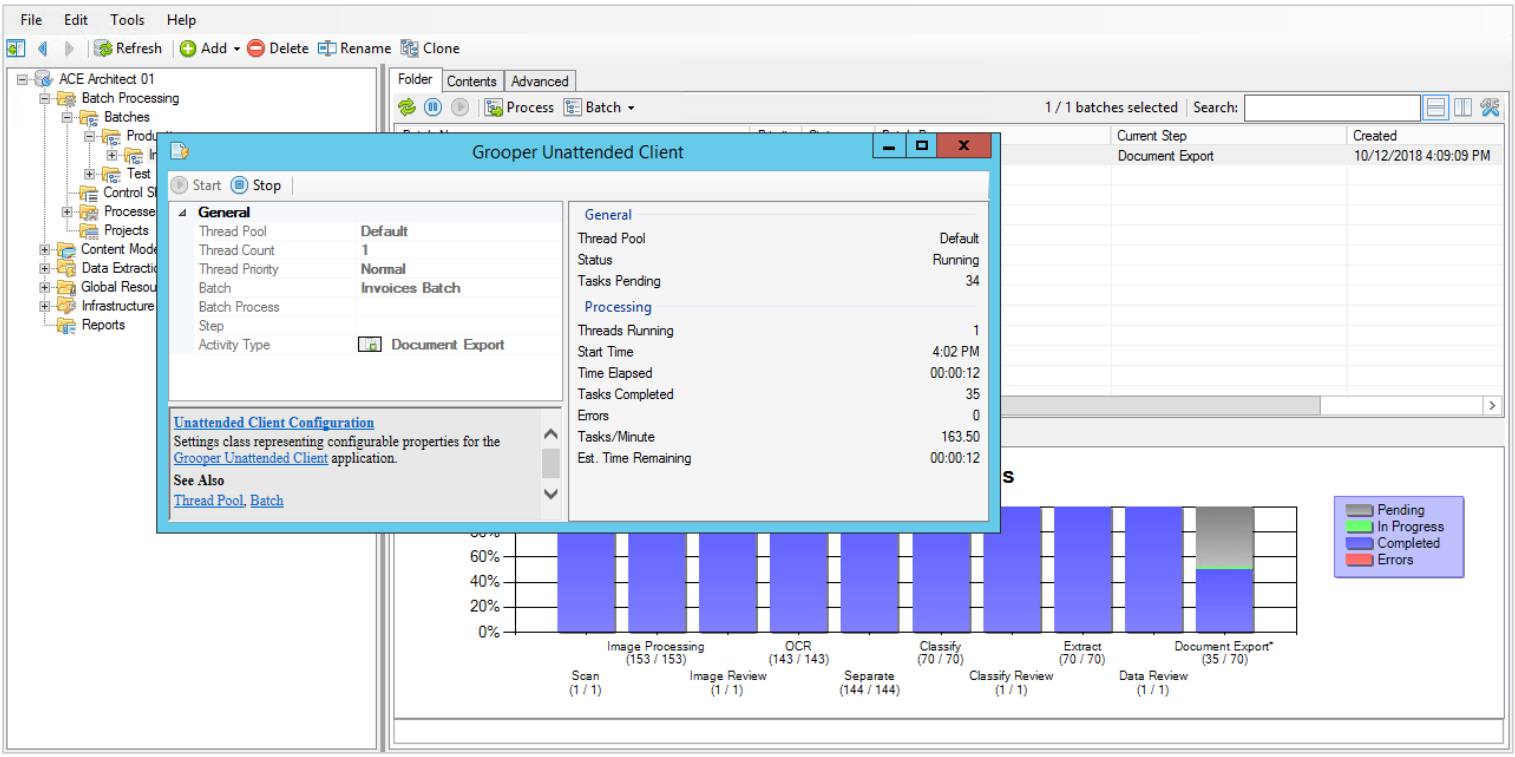
1. Navigate to (root) > Batch Processing > Batches > Production > Invoices Process
2. Make sure the batch is paused
3. Right click on the Invoices Batch and select Update Process...
4. Set Target Step to Document Export
5. Click Execute

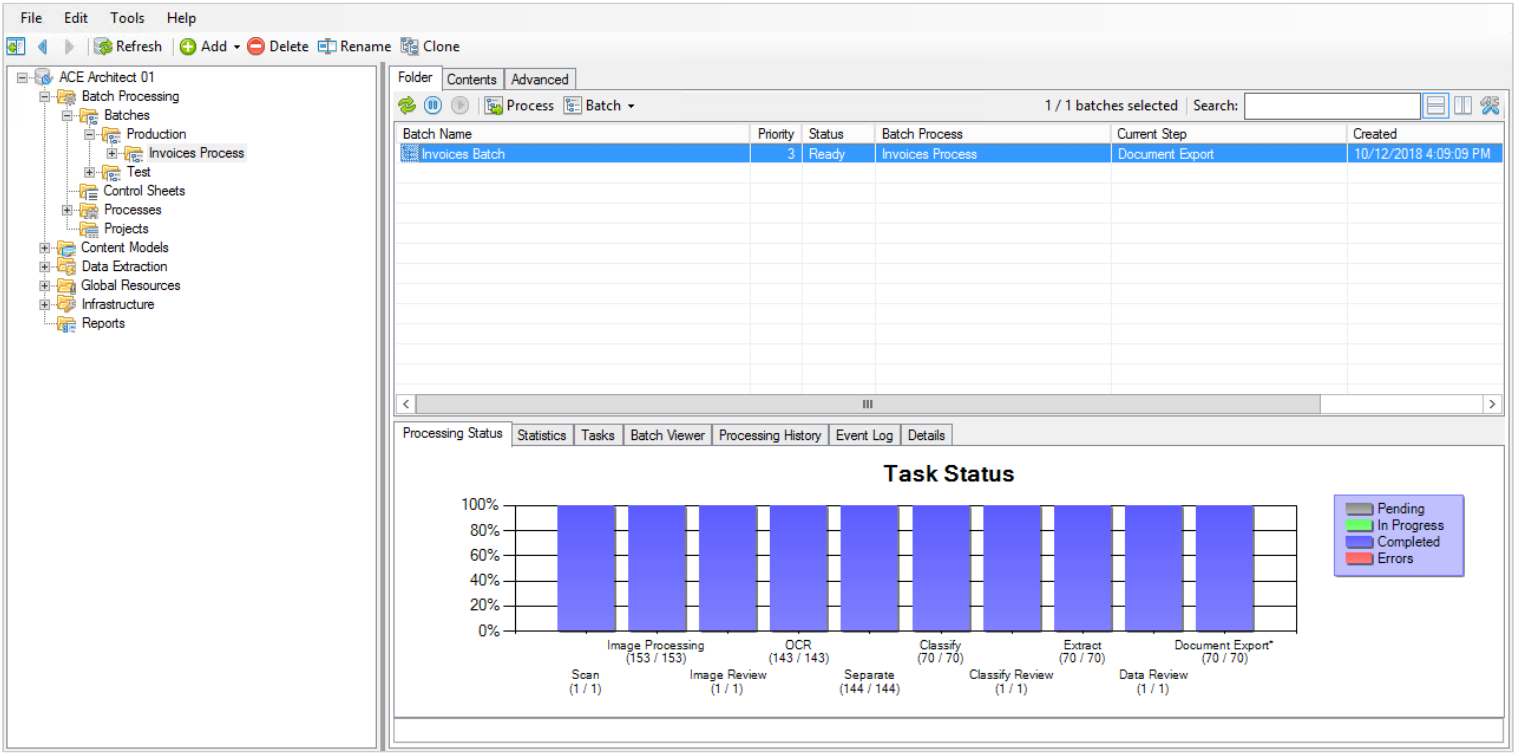

File
Edit
Tools
Help
Refresh
Add
Delete
Rename
Clone
ACE Architect 01
Batch Processing
Batches
Production
Invoices Process
Test
Control Sheets
Processes
Projects
Content Models
Data Extraction
Global Resources
Infrastructure
Reports
Folder
Contents
Advanced
Process
Batch
1 / 1 batches selected
Search:
Batch Name
Priority
Status
Batch Process
Current Step
Created
Invoices Batch
3
Paused
Invoices Process
(none)
10/12/2018 4:09:09 PM
Clone To Test
Reset...
Update Process...
Share
New...
New From
Delete
Properties...
Processing Status
Statistics
Tasks
Batch Viewer
Processing History
Event Log
Details
Task Status
100%
80%
60%
40%
20%
0%
Pending
In Progress
Completed
Errors
Scan
(1 / 1)
Image Processing
(153 / 153)
Image Review
(1 / 1)
OCR
(143 / 143)
Separate
(144 / 144)
Classify
(70 / 70)
Classify Review
(1 / 1)
Extract
(70 / 70)
Data Review
(1 / 1)


Update Process
Execute
Cancel
General
Target Step
Document Export
(none)
Invoices Process
Scan
Image Processing
Image Review
OCR
Separate
Classify
Classify Review
Extract
Data Review
Document Export
Target Step
Type: Batch Process Step
The Batch Process Step where the batch should begin processing.
Remarks
The batch will be updated to use the latest published version of the parent Batch Process.
Property Type: Batch Process Step
Represents a logical step in a Batch Process. A Batch Process Step defines an activity to be performed as part of a

Step 2

1. Resume the batch
2. Click Process
3. View the exported documents in Windows Explorer




File Edit Tools Help
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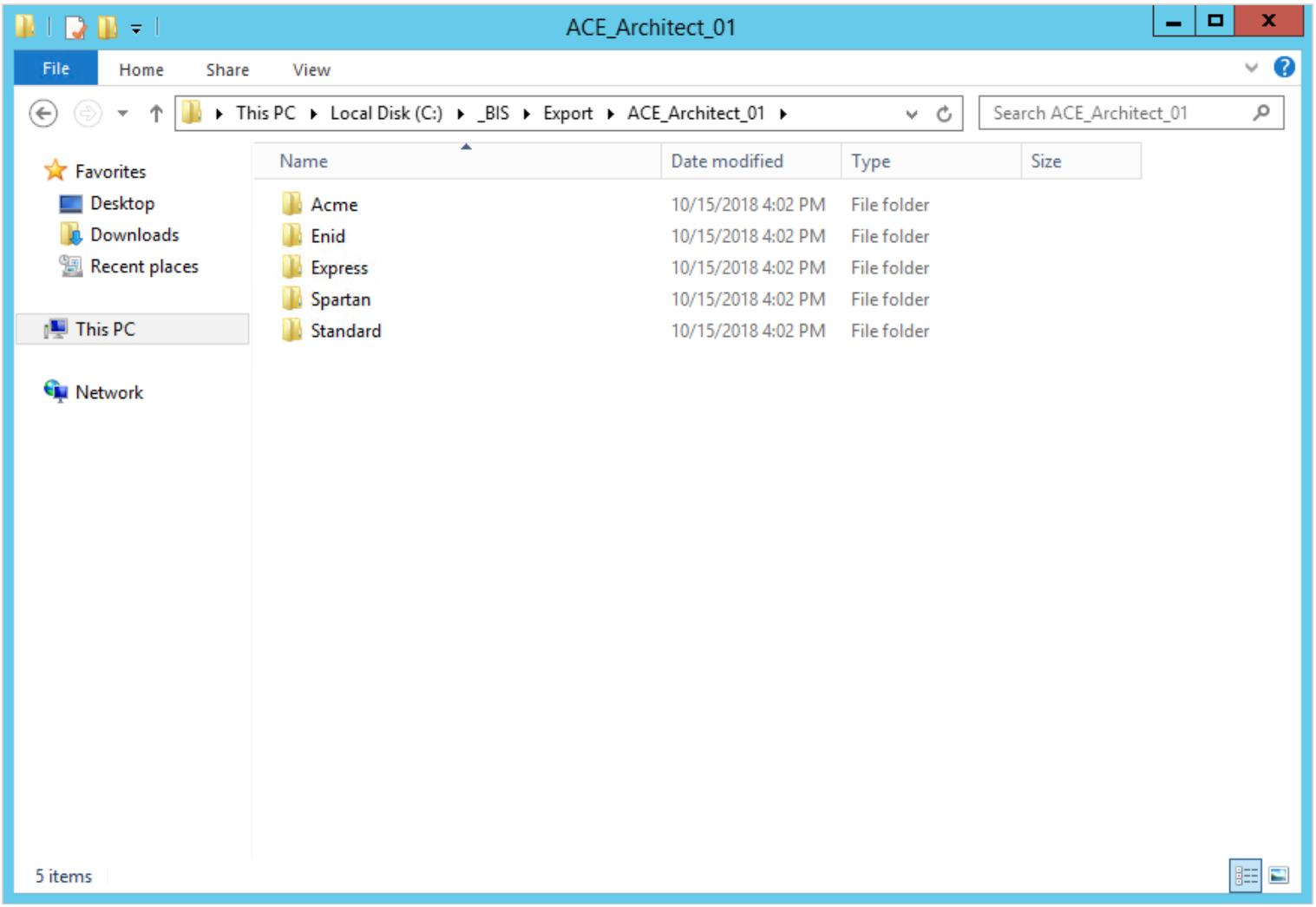
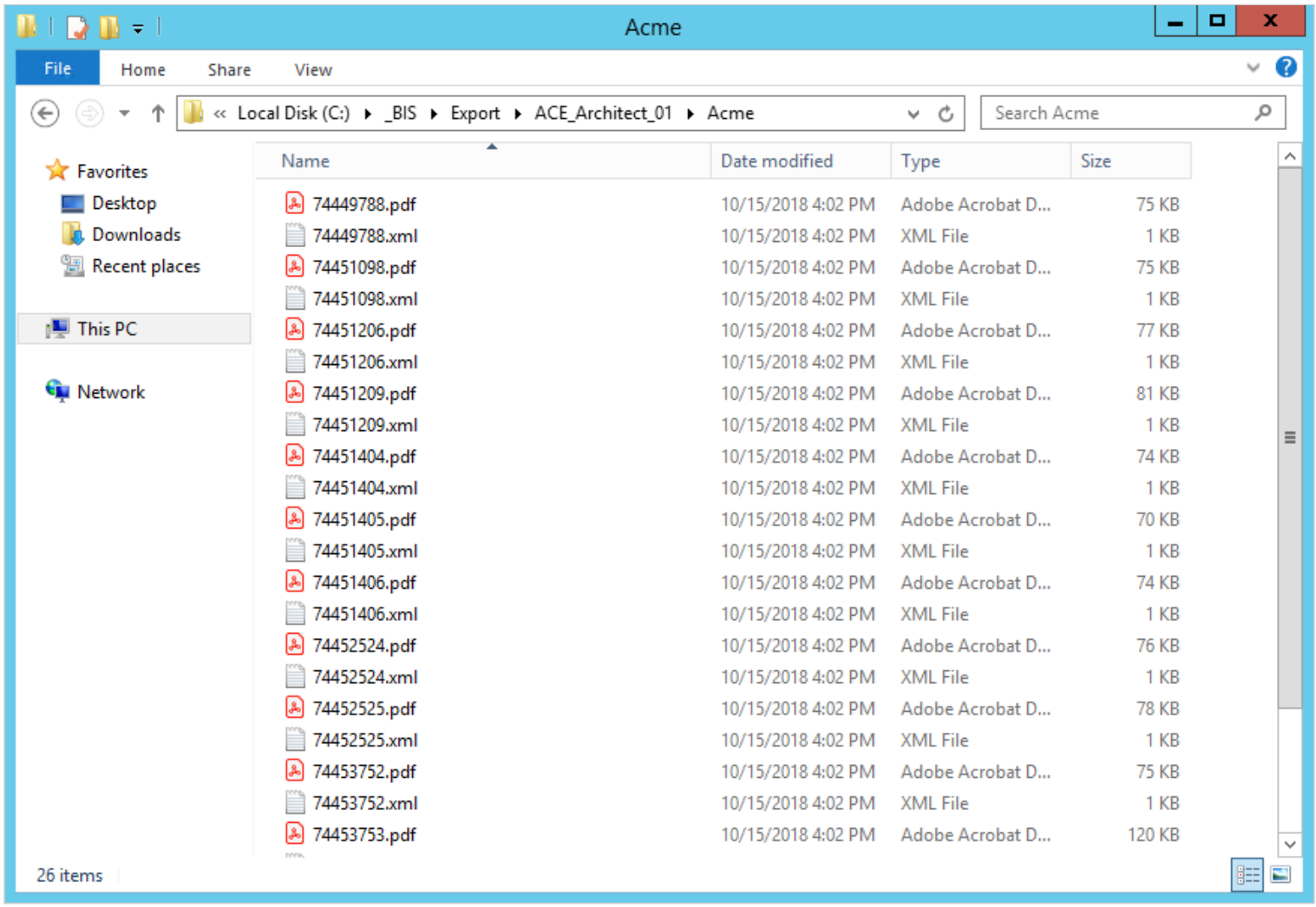
ACE Architect 01
Batch Processing
Batches
Production
Invoices Process
Test
Control Sheets
Processes
Projects
Content Models
Data Extraction
Global Resources
Infrastructure
Reports
Folder Contents Advanced
Process Batch
1 / 1 batches selected Search:
Batch Name Priority Status Batch Process Current Step Created
Invoices Batch 3 Ready Invoices Process Document Export 10/12/2018 4:09:09 PM
Processing Status Statistics Tasks Batch Viewer Processing History Event Log Details
Task Status
100%
80%
60%
40%
20%
0%
Scan (1 / 1)
Image Processing (153 / 153)
Image Review (1 / 1)
OCR (143 / 143)
Separate (144 / 144)
Classify (70 / 70)
Classify Review (1 / 1)
Extract (70 / 70)
Data Review (1 / 1)
Document Export* (70 / 70)
Pending
In Progress
Completed
Errors


ACE_Architect_01
File Home Share View
This PC ▸ Local Disk (C:) ▸ _BIS ▸ Export ▸ ACE_Architect_01 ▸
Search ACE_Architect_01
Favorites
Desktop
Downloads
Recent places
This PC
Network
Name Date modified Type Size
Acme 10/15/2018 4:02 PM File folder
Enid 10/15/2018 4:02 PM File folder
Express 10/15/2018 4:02 PM File folder
Spartan 10/15/2018 4:02 PM File folder
Standard 10/15/2018 4:02 PM File folder
5 items


Acme
File
Home
Share
View
Local Disk (C:) ▸ _BIS ▸ Export ▸ ACE_Architect_01 ▸ Acme
Search Acme
Favorites
Desktop
Downloads
Recent places
This PC
Network
Name
Date modified
Type
Size
74449788.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 75 KB
74449788.xml 10/15/2018 4:02 PM XML File 1 KB
74451098.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 75 KB
74451098.xml 10/15/2018 4:02 PM XML File 1 KB
74451206.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 77 KB
74451206.xml 10/15/2018 4:02 PM XML File 1 KB
74451209.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 81 KB
74451209.xml 10/15/2018 4:02 PM XML File 1 KB
74451404.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 74 KB
74451404.xml 10/15/2018 4:02 PM XML File 1 KB
74451405.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 70 KB
74451405.xml 10/15/2018 4:02 PM XML File 1 KB
74451406.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 74 KB
74451406.xml 10/15/2018 4:02 PM XML File 1 KB
74452524.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 76 KB
74452524.xml 10/15/2018 4:02 PM XML File 1 KB
74452525.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 78 KB
74452525.xml 10/15/2018 4:02 PM XML File 1 KB
74453752.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 75 KB
74453752.xml 10/15/2018 4:02 PM XML File 1 KB
74453753.pdf 10/15/2018 4:02 PM Adobe Acrobat D... 120 KB
26 items