Collect
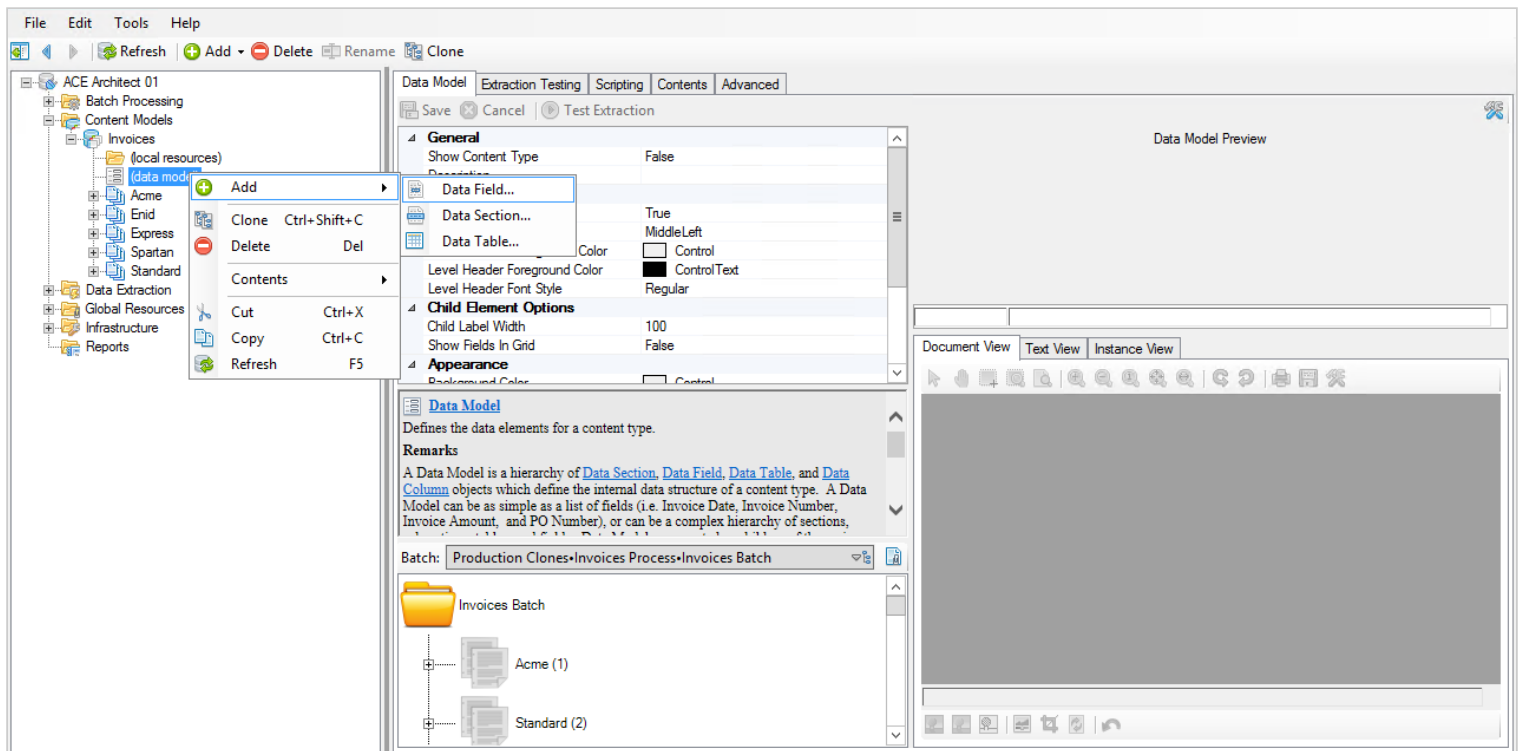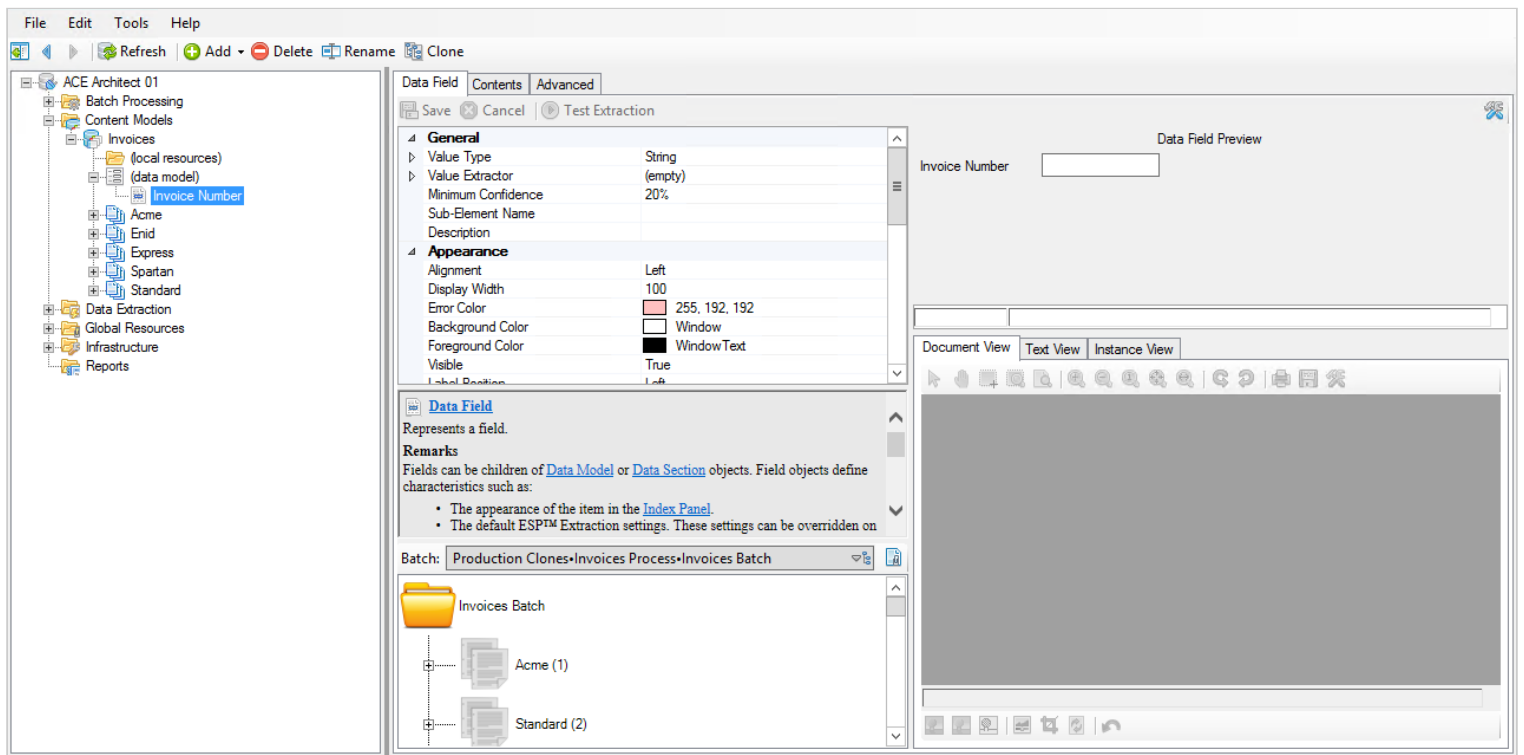
Data Field

1. Navigate to (root) > Content Models > Invoices > (data model)

2. Right click on the Data Model and select Add > Data Field...
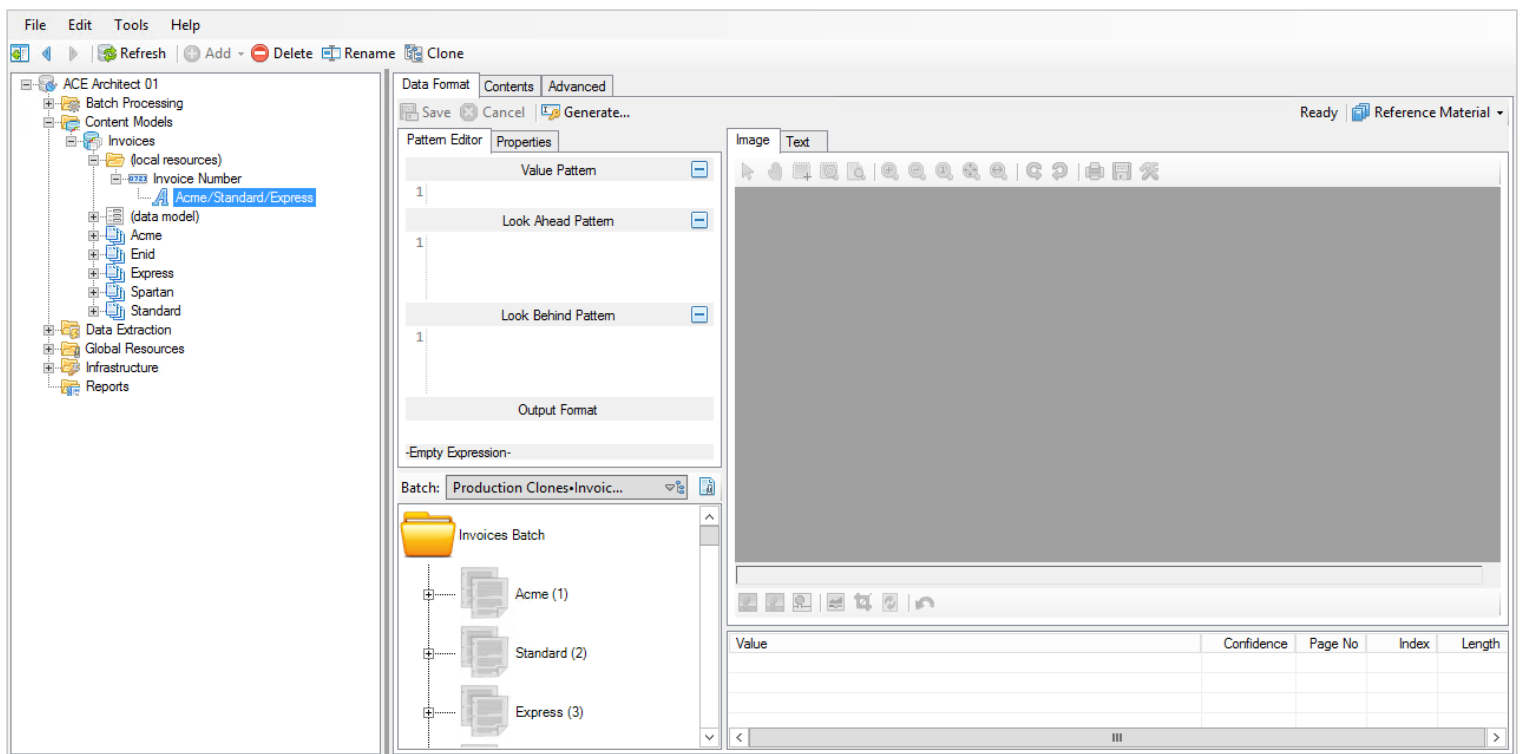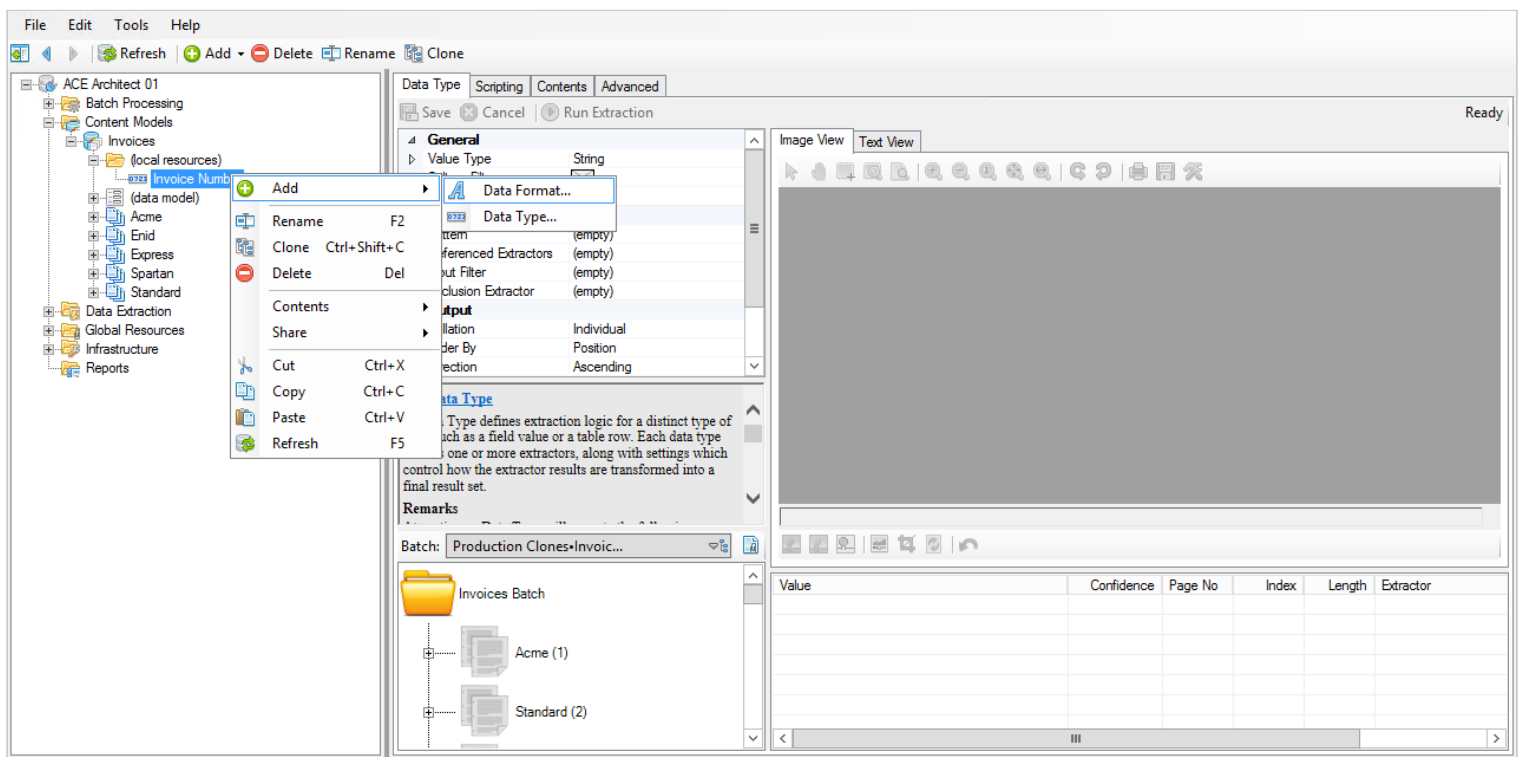
3. Name it Invoice Number

Extractors

Creating the invoice number extractor

> ❯ Step 1

1. Right click on the (local resources) folder and select Add > Data Type...

2. Name it Invoice Number

> **Step 2**

1. Right click on the Invoices Data Type and select Add > Data Format...

2. Name it Acme/Standard/Express

Screenshot 1

File   Edit   Tools   Help

Refresh | Add ▾ | ⊖ Delete | Rename | Clone

Tree:
- ACE Architect 01
  - Batch Processing
  - Content Models
    - Invoices
      - (local resources)
        - Invoice Numb...
      - (data model)
      - Acme
      - Enid
      - Express
      - Spartan
      - Standard
  - Data Extraction
  - Global Resources
  - Infrastructure
  - Reports

Context menu:
- Add ▸
  - Data Format...
  - Data Type...
- Rename   F2
- Clone   Ctrl+Shift+C
- Delete   Del
- Contents   ▸
- Share   ▸
- Cut   Ctrl+X
- Copy   Ctrl+C
- Paste   Ctrl+V
- Refresh   F5

Tabs: Data Type | Scripting | Contents | Advanced

Save Cancel Run Extraction   Ready

General
- Value Type   String
- ...Filter
- ...tern   (empty)
- ...ferenced Extractors   (empty)
- ...put Filter   (empty)
- ...clusion Extractor   (empty)
- **...utput**
- ...llation   Individual
- ...der By   Position
- ...ection   Ascending

...a Type
...a Type defines extraction logic for a distinct type of ...uch as a field value or a table row. Each data type ...s one or more extractors, along with settings which control how the extractor results are transformed into a final result set.

Remarks

Batch: Production Clones•Invoic...

Invoices Batch
- Acme (1)
- Standard (2)

Image View | Text View

Value	Confidence	Page No	Index	Length	Extractor

Screenshot 2

File   Edit   Tools   Help

Refresh | Add ▾ | ⊖ Delete | Rename | Clone

Tree:
- ACE Architect 01
  - Batch Processing
  - Content Models
    - Invoices
      - (local resources)
        - Invoice Number
          - Acme/Standard/Express
      - (data model)
      - Acme
      - Enid
      - Express
      - Spartan
      - Standard
  - Data Extraction
  - Global Resources
  - Infrastructure
  - Reports

Tabs: Data Format | Contents | Advanced

Save Cancel Generate...   Ready | Reference Material ▾

Pattern Editor | Properties

Value Pattern
1

Look Ahead Pattern
1

Look Behind Pattern
1

Output Format

-Empty Expression-

Batch: Production Clones•Invoic...

Invoices Batch
- Acme (1)
- Standard (2)
- Express (3)

Image | Text

Value	Confidence	Page No	Index	Length

1. Select Acme (1) from the batch viewer

2. In the Value Pattern editor, type:

   ```
   invoice\snumber\s?:?\s(\d{8,10})
   ```

3. In the Output Format editor, type:

   ```
   {1}
   ```

1. Right click on the Invoice Number Data Type and select Contents > Add Multiple Items...

2. In the Contents • Add Multiple Items window, set Item Type to Data Format

3. Edit the Item Names property and type out the names of the other formats:

   • Spartan

   • Enid

4. Click Execute to complete

Contents • Add Multiple Items

? X
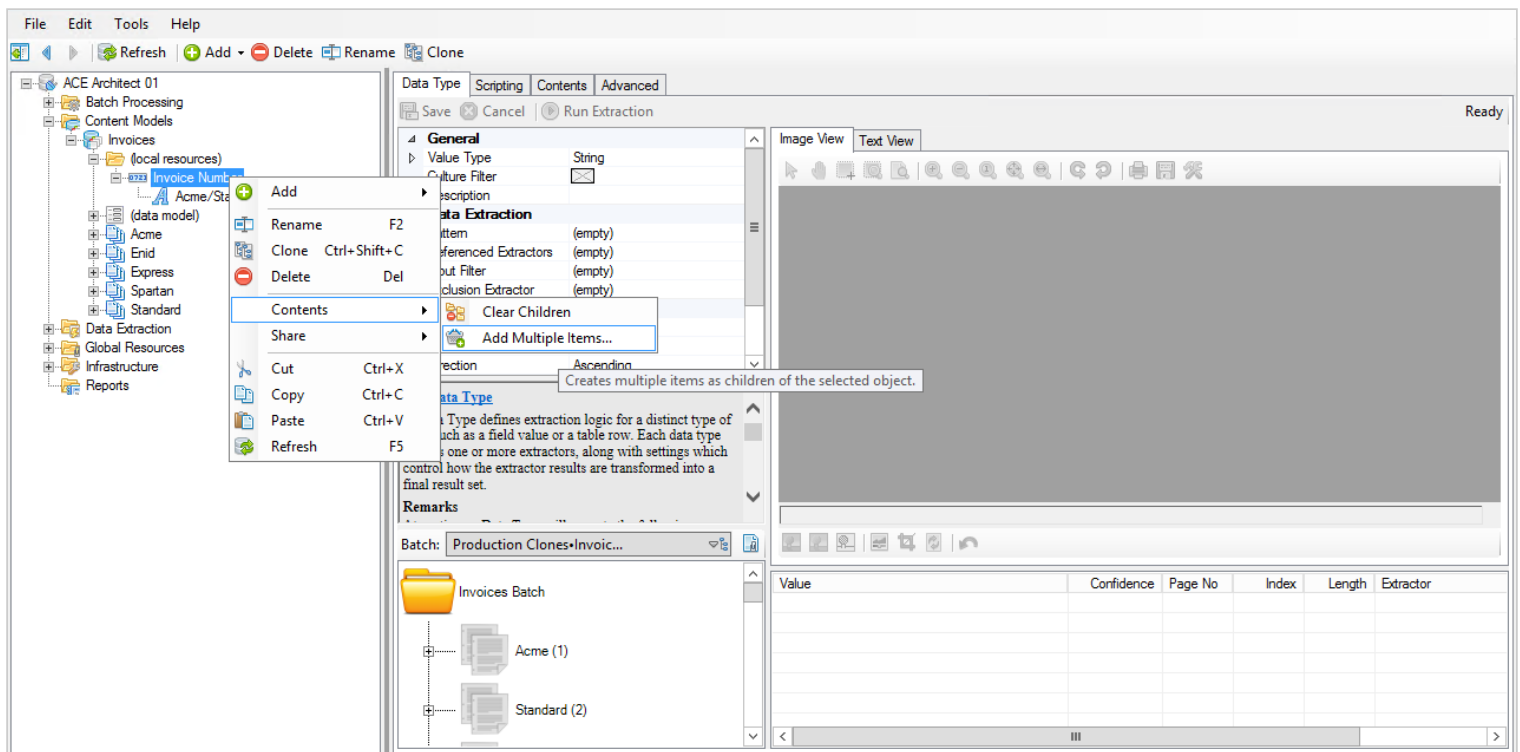
✓ Execute ✗ Cancel

▲ **General**

| Item Type | **Data Format** |
| **Item Names** | **2 entries** ⌄ |

Spartan
Enid

Item Names
Type: String
The names of the child items to create.

Remarks
For each name provided in the list, a child item of the specified Item Type will be created.
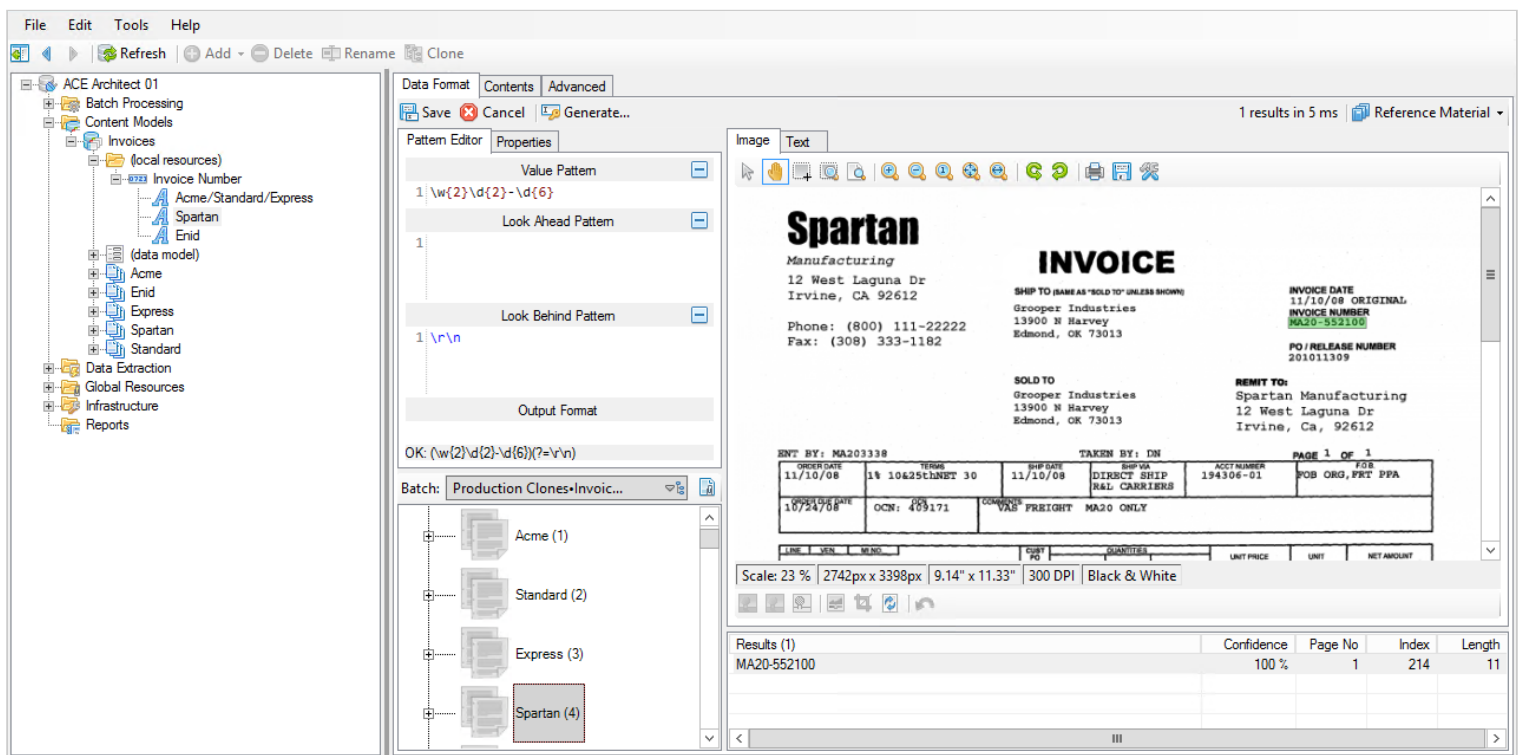

> Step 5

1. Select the Invoice Number > Spartan Data Format

2. Select Spartan (4) in the batch viewer

3. In the Value Pattern editor, type:

   ```
   \w{2}\d{2}-\d{6}
   ```

4. In the Look Behind editor, type:
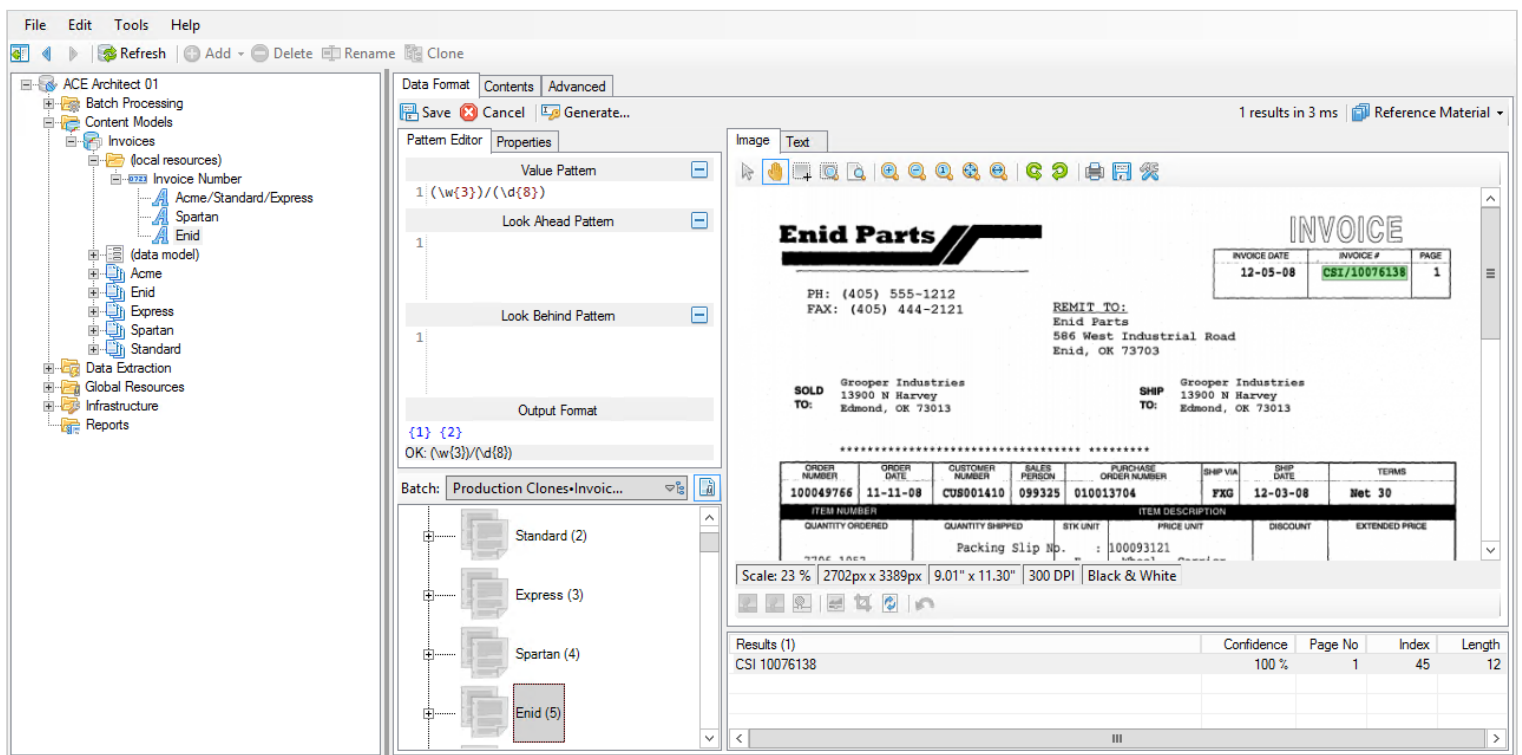
   ```
   \r\n
   ```

> **Step 6**

1. Select the Invoice Number > Enid Data Format

2. Select Enid (5) in the batch viewer

3. In the Value Pattern editor, type:

   `(\w{3})(\d{8})`

4. In the Output Format editor, type:

   `{1} {2}`

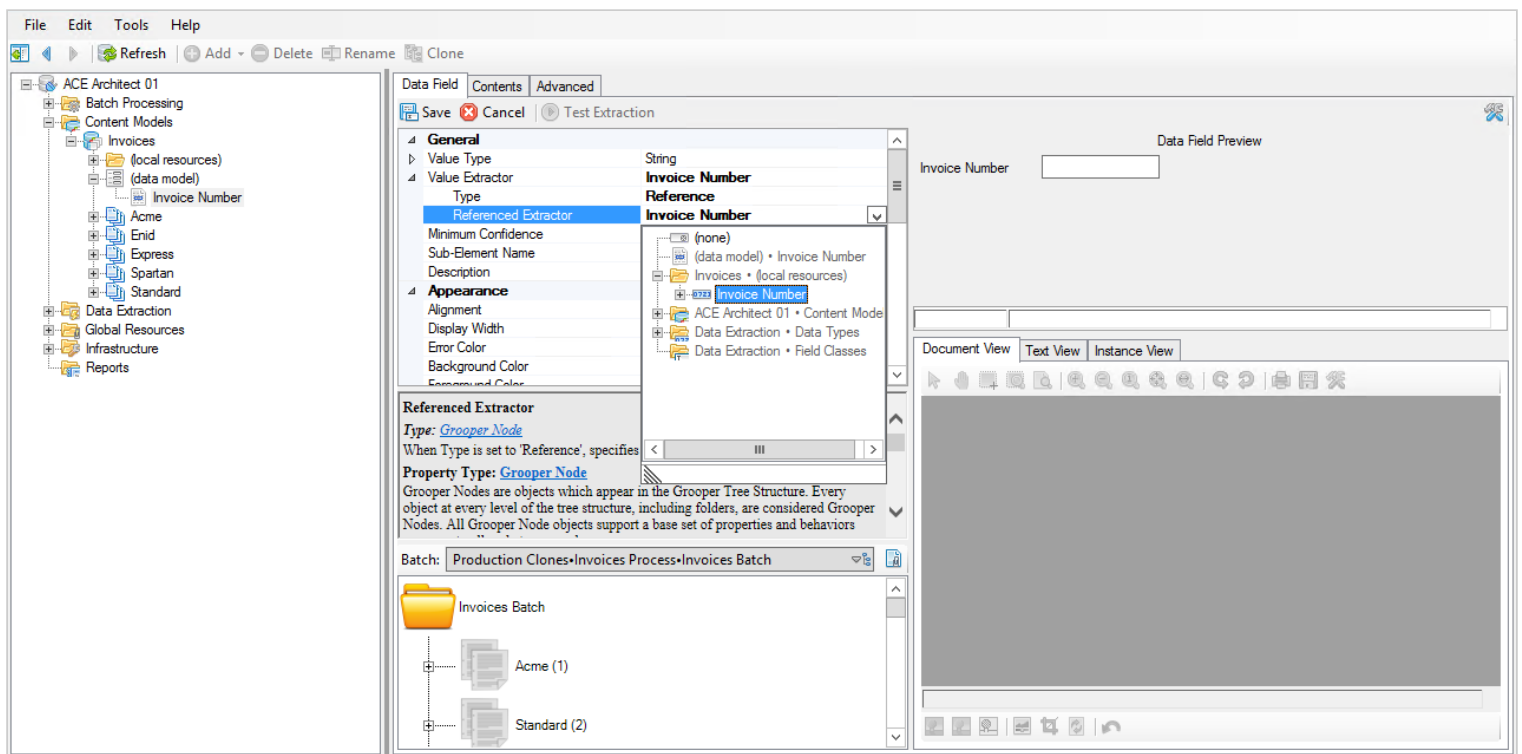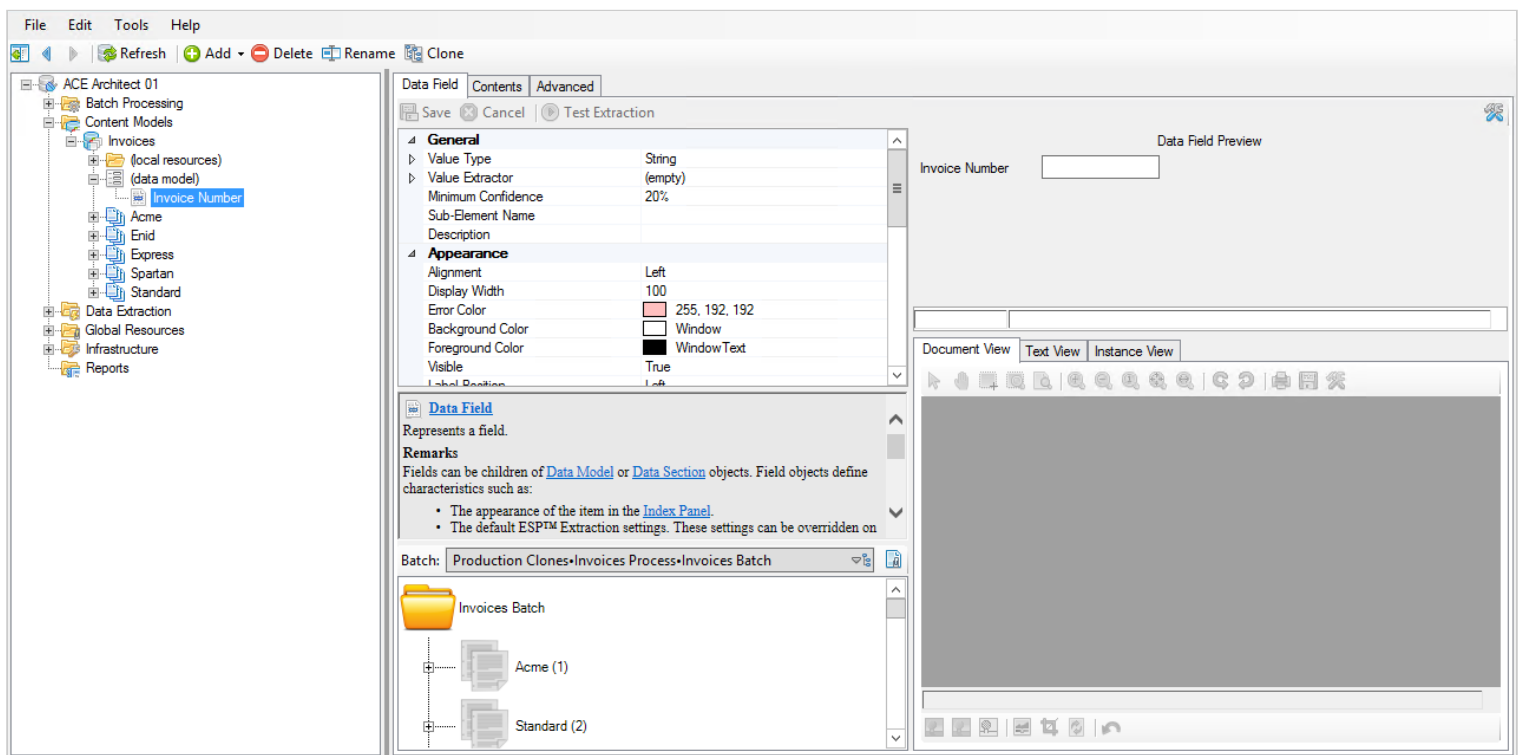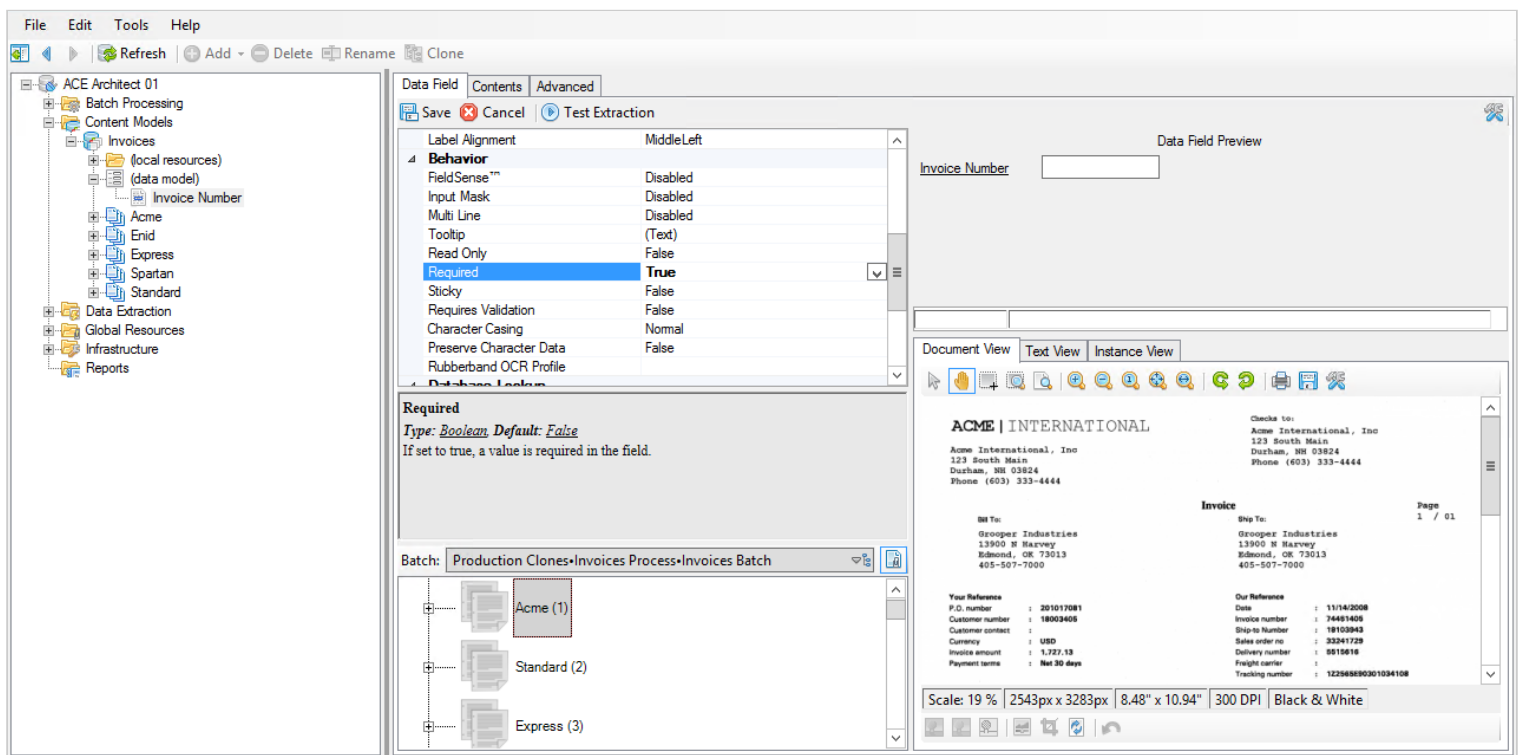# Linking the extractor to the field

> **Step 1**

1. In the Invoices Content Model, navigate to (data model) > Invoice Number

2. In the General section, expand the Value Extractor property

3. Set the Value Extractor > Type property to Reference

4. Set the Value Extractor > Referenced Extractor property to the Invoices > Invoice Number Data Type

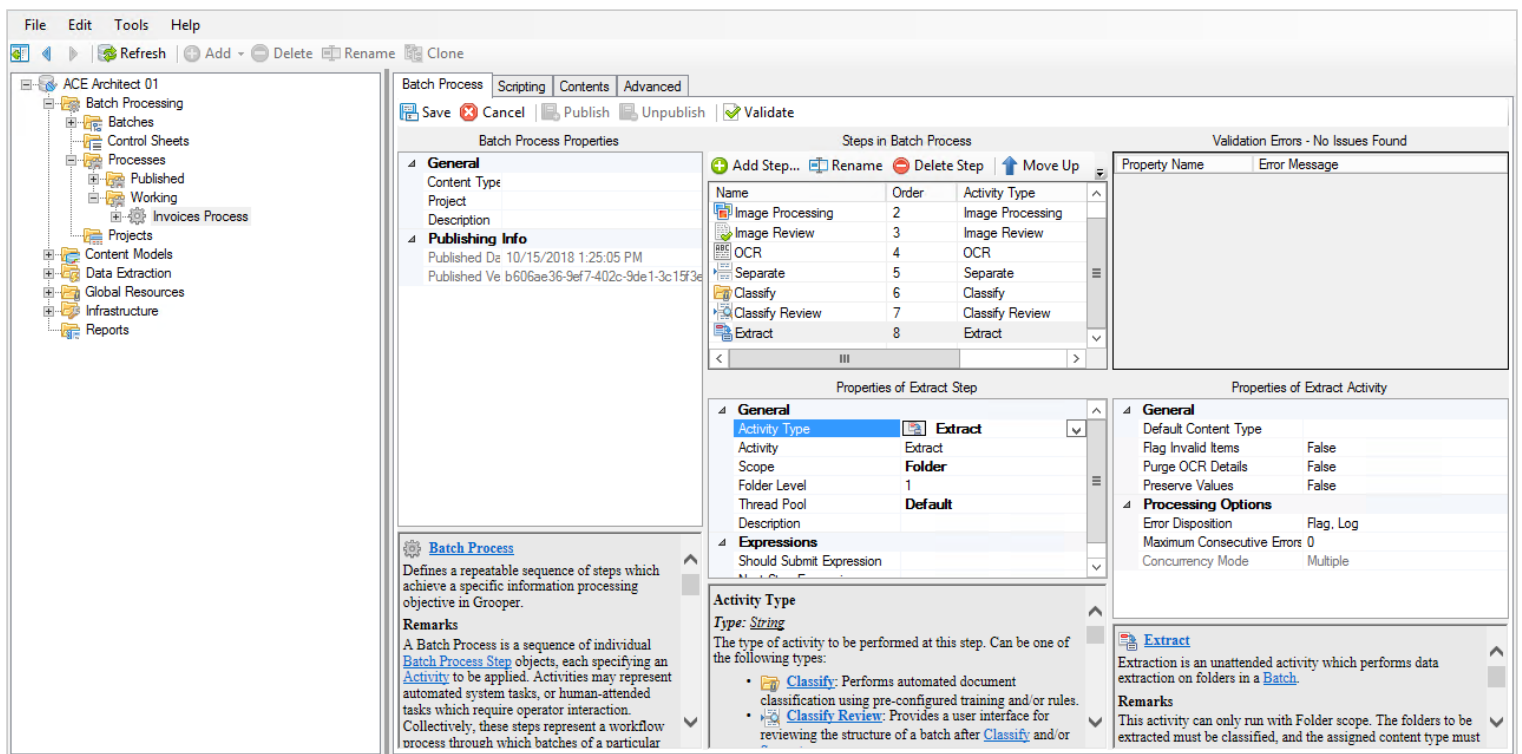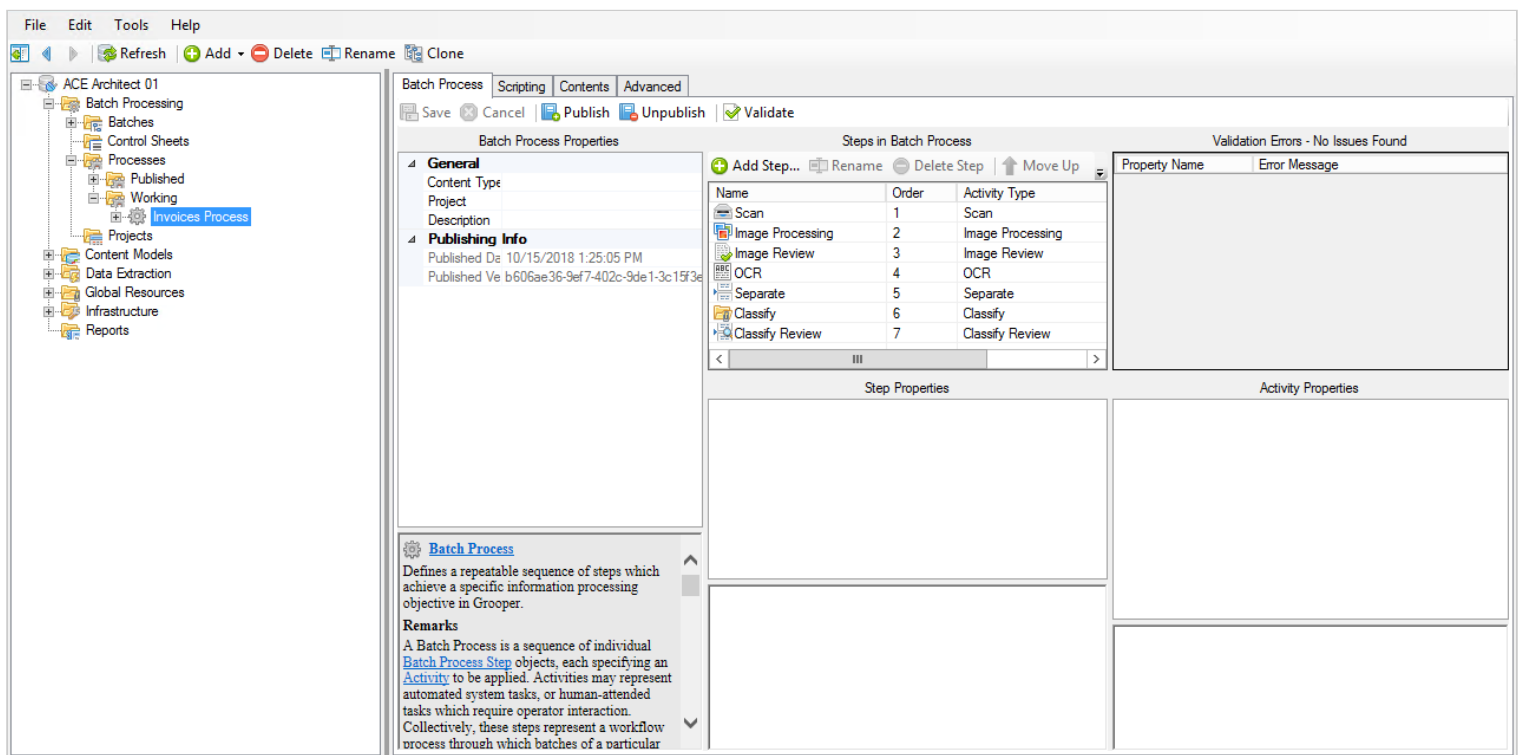5. In the Behavior section, set the Required property to True

Screenshot 1

Menu bar: File Edit Tools Help

Toolbar: Refresh Add ▾ Delete Rename Clone

Tree:
- ACE Architect 01
  - Batch Processing
  - Content Models
    - Invoices
      - (local resources)
      - (data model)
        - Invoice Number
      - Acme
      - Enid
      - Express
      - Spartan
      - Standard
  - Data Extraction
  - Global Resources
  - Infrastructure
  - Reports

Tabs: Data Field | Contents | Advanced

Buttons: Save Cancel Test Extraction

General	
Value Type	String
Value Extractor	(empty)
Minimum Confidence	20%
Sub-Element Name	
Description	
Appearance	
Alignment	Left
Display Width	100
Error Color	255, 192, 192
Background Color	Window
Foreground Color	WindowText
Visible	True
Label Position	Left

Data Field

Represents a field.

Remarks

Fields can be children of Data Model or Data Section objects. Field objects define characteristics such as:

- The appearance of the item in the Index Panel.
- The default ESP™ Extraction settings. These settings can be overridden on

Batch: Production Clones•Invoices Process•Invoices Batch

Invoices Batch
- Acme (1)
- Standard (2)

Data Field Preview

Invoice Number

Document View | Text View | Instance View

Screenshot 2

Menu bar: File Edit Tools Help

Toolbar: Refresh Add ▾ Delete Rename Clone

Tree:
- ACE Architect 01
  - Batch Processing
  - Content Models
    - Invoices
      - (local resources)
      - (data model)
        - Invoice Number
      - Acme
      - Enid
      - Express
      - Spartan
      - Standard
  - Data Extraction
  - Global Resources
  - Infrastructure
  - Reports

Tabs: Data Field | Contents | Advanced

Buttons: Save Cancel Test Extraction

General	
Value Type	String
Value Extractor	**Invoice Number**
Type	Reference
Referenced Extractor	Invoice Number
Minimum Confidence	
Sub-Element Name	
Description	
Appearance	
Alignment	
Display Width	
Error Color	
Background Color	
Foreground Color	

Dropdown:
- (none)
- (data model) • Invoice Number
- Invoices • (local resources)
  - Invoice Number
- ACE Architect 01 • Content Mode
- Data Extraction • Data Types
- Data Extraction • Field Classes

Referenced Extractor

Type: Grooper Node

When Type is set to 'Reference', specifies

Property Type: Grooper Node

Grooper Nodes are objects which appear in the Grooper Tree Structure. Every object at every level of the tree structure, including folders, are considered Grooper Nodes. All Grooper Node objects support a base set of properties and behaviors

Batch: Production Clones•Invoices Process•Invoices Batch

Invoices Batch
- Acme (1)
- Standard (2)

Data Field Preview

Invoice Number

Document View | Text View | Instance View

Extraction & Data Review
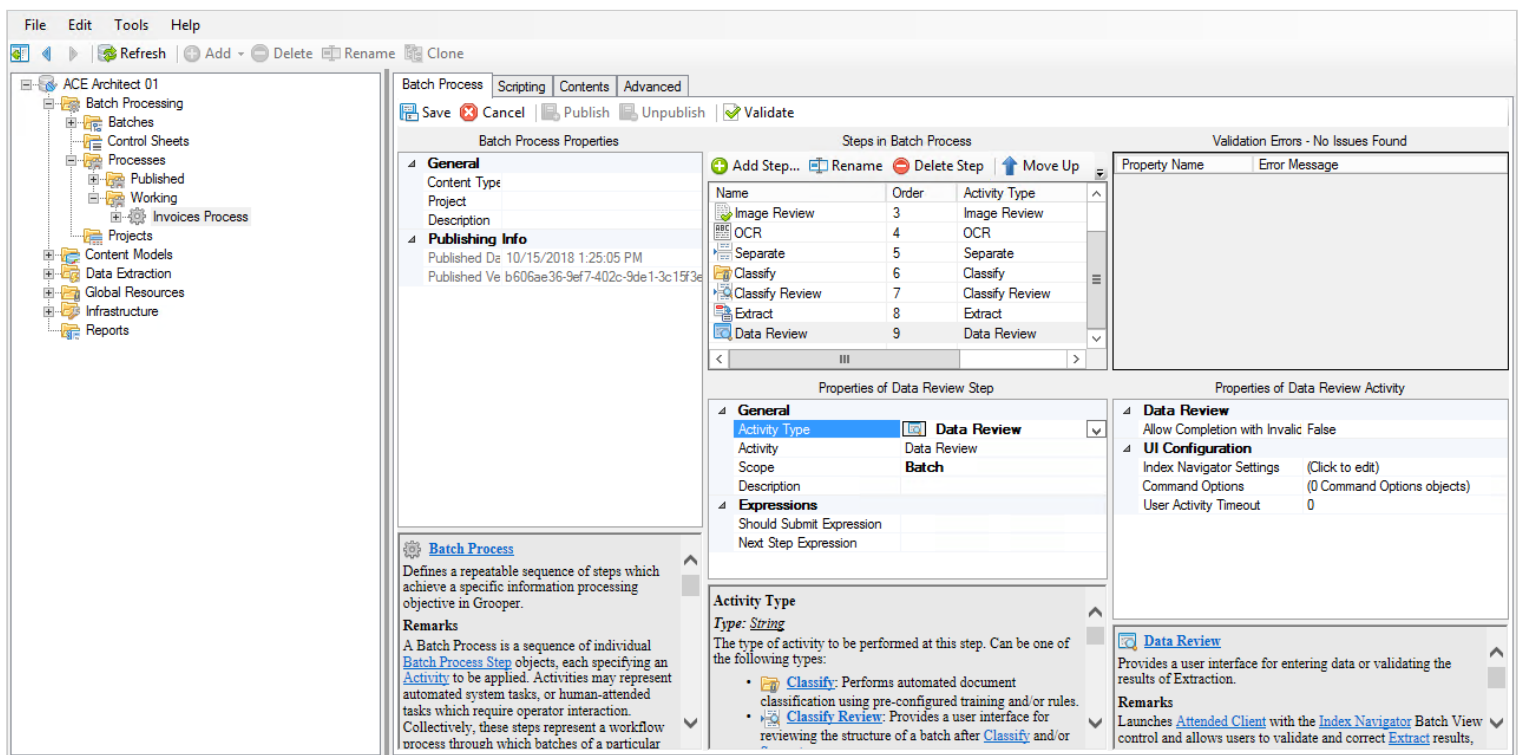
Adding Extract and Data Review steps

> **Step 1**

1. Navigate to (root) > Batch Processing > Processes > Working > Invoices Process

2. Add a new step

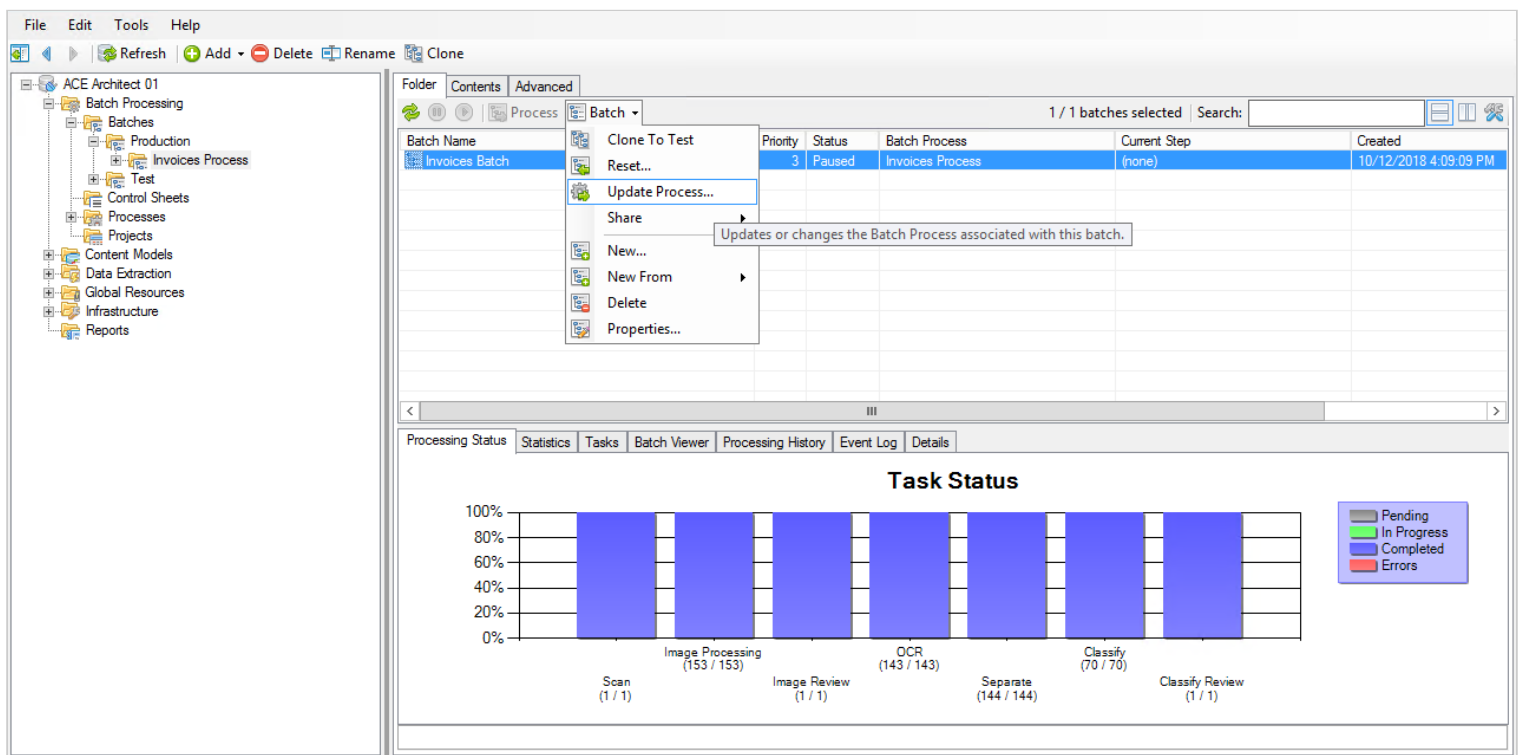3. Set the Activity Type property of the new step to Extract

> **Step 2**

1. Add a new step

2. Set the Activity Type property of the new step to Data Review

3. Save and Publish

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 Extract

5. Click Execute

Screen 1 - ACE Architect 01 window

File Edit Tools Help

Refresh | Add ▾ | Delete | Rename | Clone

Folder | Contents | Advanced

Process | Batch ▾ | 1 / 1 batches selected | Search: |

- ACE Architect 01
  - Batch Processing
    - Batches
      - Production
        - Invoices Process
      - Test
    - Control Sheets
    - Processes
    - Projects
  - Content Models
  - Data Extraction
  - Global Resources
  - Infrastructure
  - Reports

Batch menu:
- Clone To Test
- Reset...
- Update Process...
- Share ▸
- New...
- New From ▸
- Delete
- Properties...

Updates or changes the Batch Process associated with this batch.

Batch Name	Priority	Status	Batch Process	Current Step	Created
Invoices Batch	3	Paused	Invoices Process	(none)	10/12/2018 4:09:09 PM

Processing Status | Statistics | Tasks | Batch Viewer | Processing History | Event Log | Details

Task Status

Legend: 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)

Screen 2 - Update Process dialog

Update Process | ? | X

Execute   Cancel

▲ General

Target Step | Extract ▾

- (none)
- Invoices Process
  - Scan
  - Image Processing
  - Image Review
  - OCR
  - Separate
  - Classify
  - Classify Review
  - Extract
  - Data Review

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

1. Resume the batch

2. Click Process

Reviewing extraction results

Step 1

1. After the Extract step has completed, click Process to start the Data Review step

2. In Grooper Data Review, press Ctrl + I on your keyboard

Step 2

1. Fix the issue with the field

2. Use Ctrl + I to jump to the next document with an issue

3. Repeat until all documents are valid

4. In the toolbar, click the Complete Task button

Start   Stop | Open Task...   Close Task   Complete Task | New Batch...   Settings...

7   of 70   Spartan (7)

Invoice Number   MI05-465904

INVOICE DATE
12/10/08 ORIGINAL
INVOICE NUMBER
MI05-465904

PO / RELEASE NUMBER

No Issues | Field is OK

General
Batch Process Name	Invoices Process
Batch Name	Invoices Batch
Batch Open Time	00:19:30
Invalid Document Count	3

Data Review
Field Rubberband

Scale: 155 % | 2752px x 3424px | 9.17" x 11.41" | 300 DPI | Black & White

---

Start   Stop | Open Task...   Close Task   Complete Task | New Batch...   Settings...

38   of 70   ACE Architect 01•Batch Processing•Batch

Invoice Number

STANDARD
Products
19658 South Frisk
Oklahoma City, OK 73102

PAGE 1 OF 1   **ORIGINAL INVOICE**

ACCOUNT NUMBER	863309308
INVOICE NUMBER	9770919703
INVOICE DATE	11/03/2008
DUE DATE	12/03/2008
AMOUNT DUE	791.10

PO NUMBER: 951001335

SHIP TO
Grooper Industries
13900 N Harvey
Edmond, OK 73013
405-507-7000

BILL TO
Grooper Industries
13900 N Harvey
Edmond, OK 73013
405-507-7000

THANK YOU !

PO LINE #	ITEM #	DESCRIPTION	QUANTITY	BACK ORDERED	UNIT PRICE	TOTAL
	2FCA1	WALL AIR CONDITIONER,COOL HEAT,14000BTUH MANUFACTURER # FAH14E2	1		791.10	791.10

1 Issue | Value is required.

General
Batch Process Name	Invoices Process
Batch Name	Invoices Batch
Batch Open Time	00:20:34
Invalid Document Count	3

Data Review
Field Rubberband

Scale: 32 % | 2746px x 3424px | 9.15" x 11.41" | 300 DPI | Black & White

Invoice (top)

Spartan
Manufacturing

INVOICE

12 West Laguna Dr
Irvine, CA 92612

Phone: (800) 111-22222
Fax: (308) 333-1182

SHIP TO (SAME AS "SOLD TO" UNLESS SHOWN)
Grooper Industries
13900 N Harvey
Edmond, OK 73013

INVOICE DATE
11/04/08 ORIGINAL
INVOICE NUMBER
WI02-439254

PO / RELEASE NUMBER
951001340

SOLD TO
Grooper Industries
13900 N Harvey
Edmond, OK 73013

REMIT TO:
Spartan Manufacturing
12 West Laguna Dr
Irvine, Ca, 92612

ENT BY: WI025190   TAKEN BY: WB   PAGE 1 OF 1

ORDER DATE	TERMS	SHIP DATE	SHIP VIA	ACCT NUMBER	F.O.B.
11/03/08	1% 10&25thNET 30	11/04/08	OUR TRUCK	101270-01	FOB ORG,FRT PREPAID

ORDER DUE DATE	OCN:	COMMENTS:
11/04/08	416611	(UPS #F8034X)(SHIP ORDERS COMPLETE!!)

LINE	VEN	MI NO.		CUST PO ITEM	QUANTITIES			UNIT PRICE	UNIT	NET AMOUNT
DESCRIPTION		CUSTOMER INFORMATION			ORDER	B/O	SHIPPED			
1 00825 T 04623					1	0	1	9.360	E	9.36
15123 CONE										
STD.HI-VOLUME TAPERS										
IL30=1										

Scale: 32 %   2753px x 3427px   9.18" x 11.42"   300 DPI   Black & White

---

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

1 / 1 batches selected | Search: _____

Batch Name	Priority	Status	Batch Process	Current Step	Created
Invoices Batch	3	Working	Invoices Process	Data Review	10/12/2018 4:09:09 PM

Processing Status | Statistics | Tasks | Batch Viewer | Processing History | Event Log | Details

Task Status

Legend:
- Pending
- In Progress
- Completed
- Errors

Chart bars (0%–100%):
- 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)