Collect
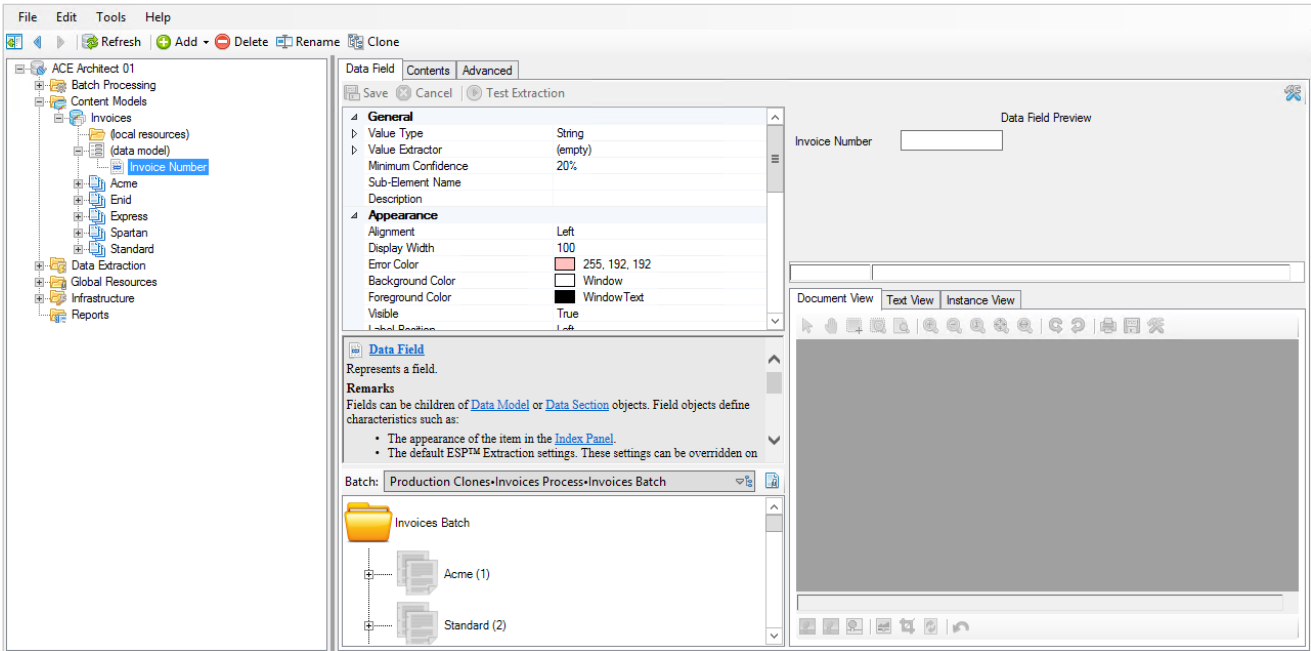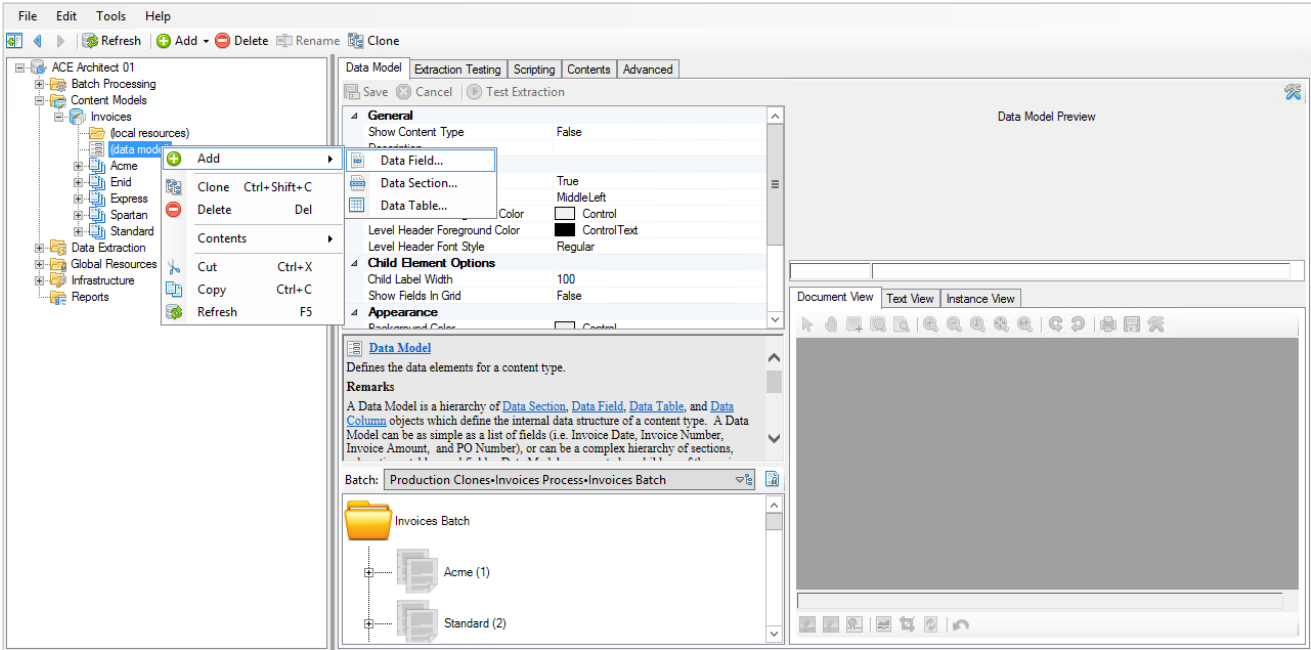
Data Field

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

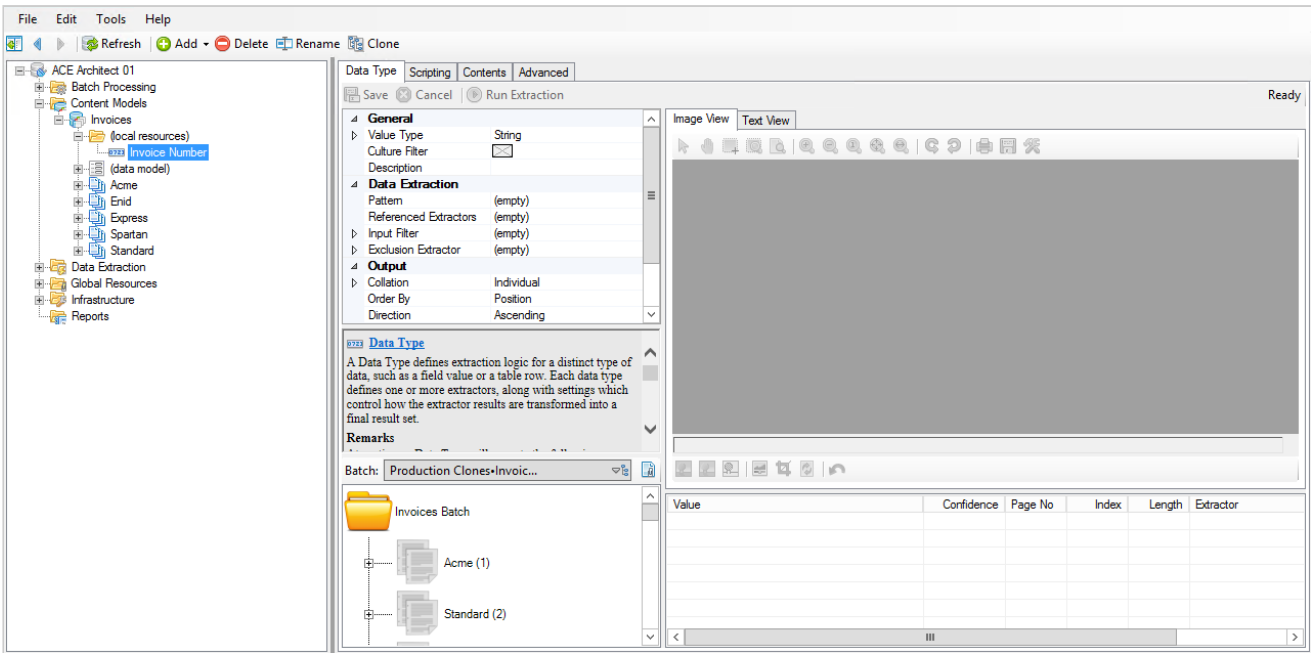2. Right click on the Data Model and select Add > Data Field...

3. Name it Invoice Number

Extractors

Creating the invoice number extractor

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

2. Name it Invoice Number
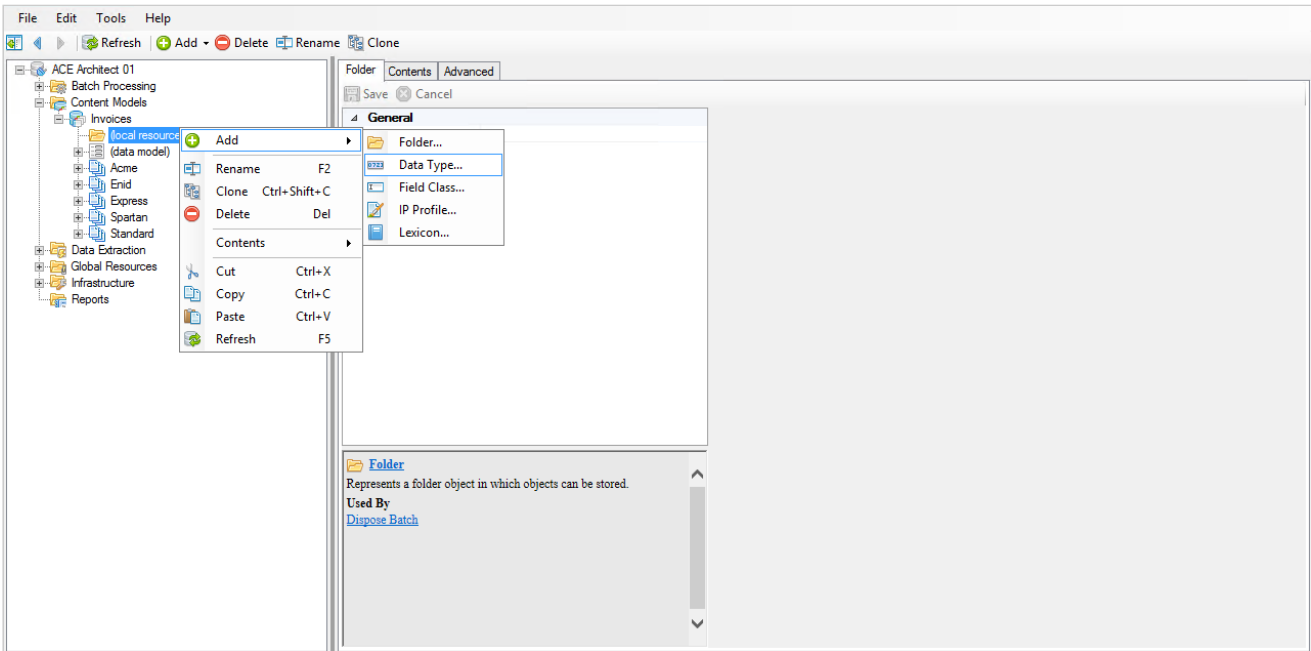
1. Right click on the Invoices Data Type and select Add > Data Format...

2. Name it Acme/Standard/Express
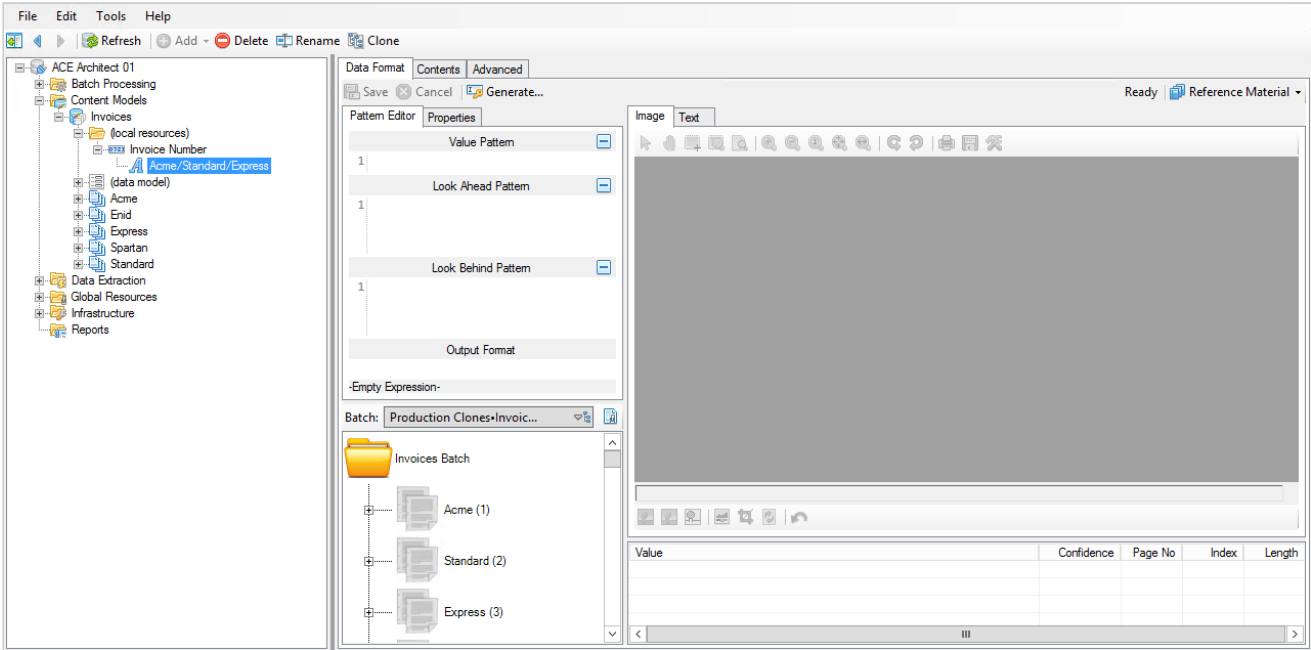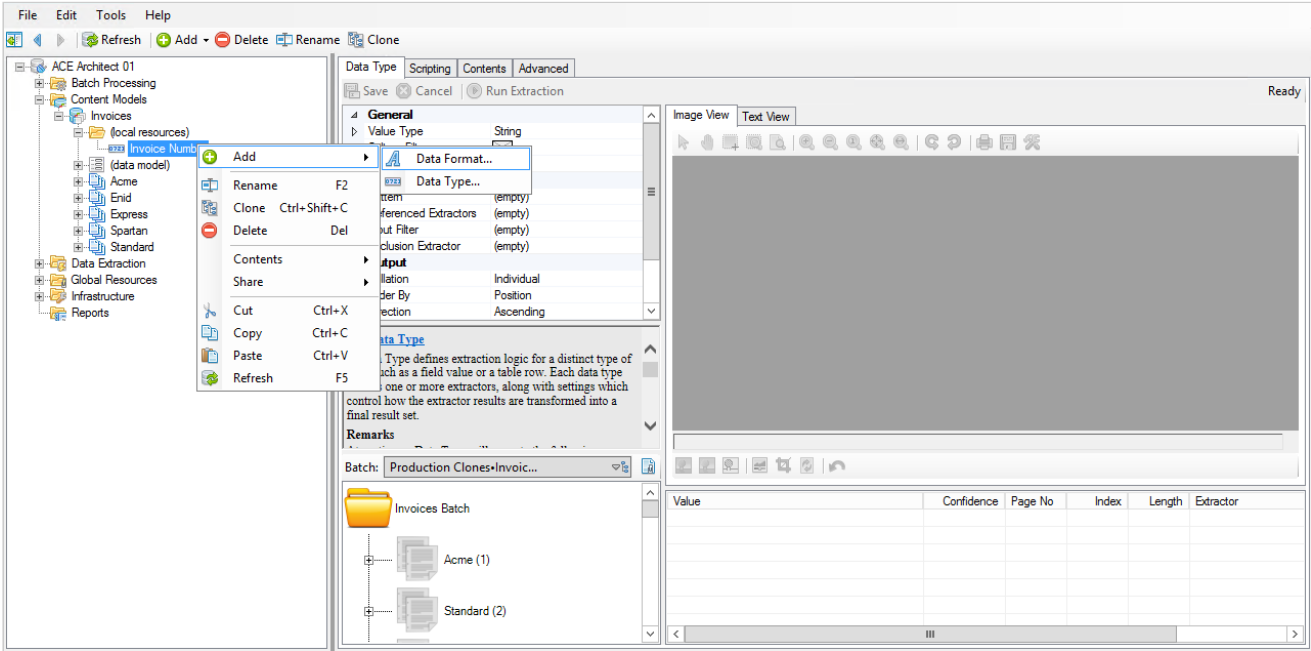
> **Step 3**

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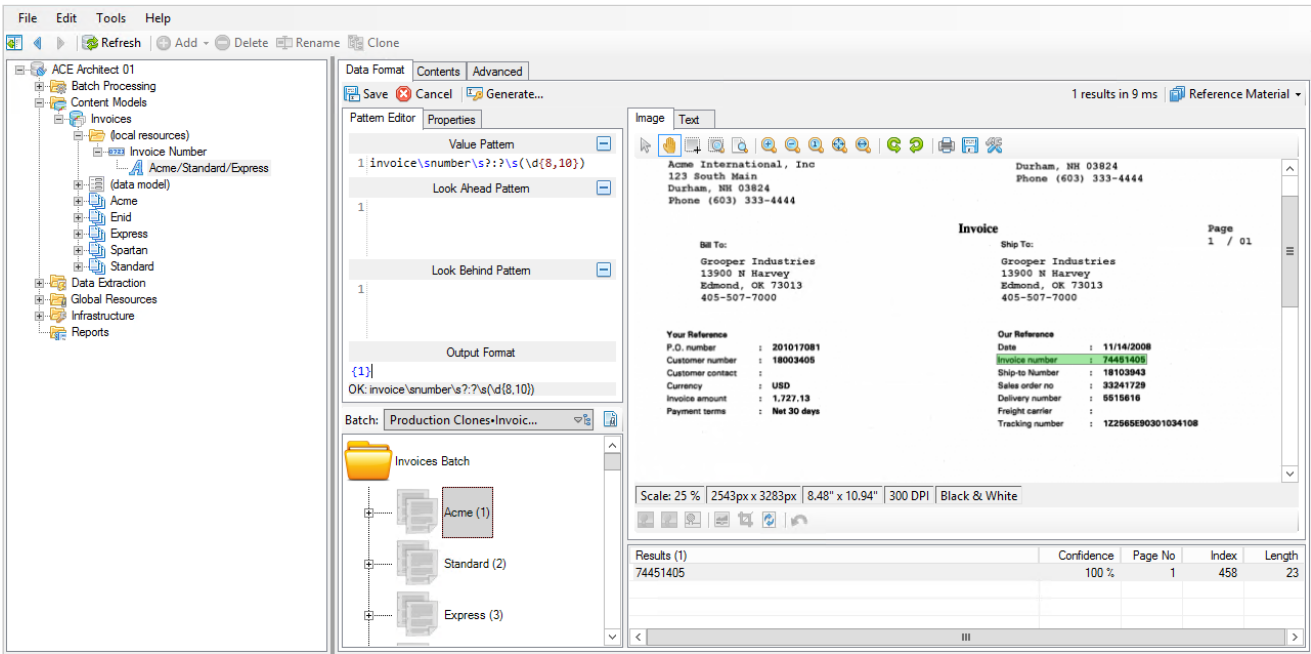
1. Right click on the Invoice Number Data Type and select Contents > Add Multiple Items...

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

✅ Execute ❌ Cancel

General

Item Type	
Item Names	Data Format
	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
```

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}
```
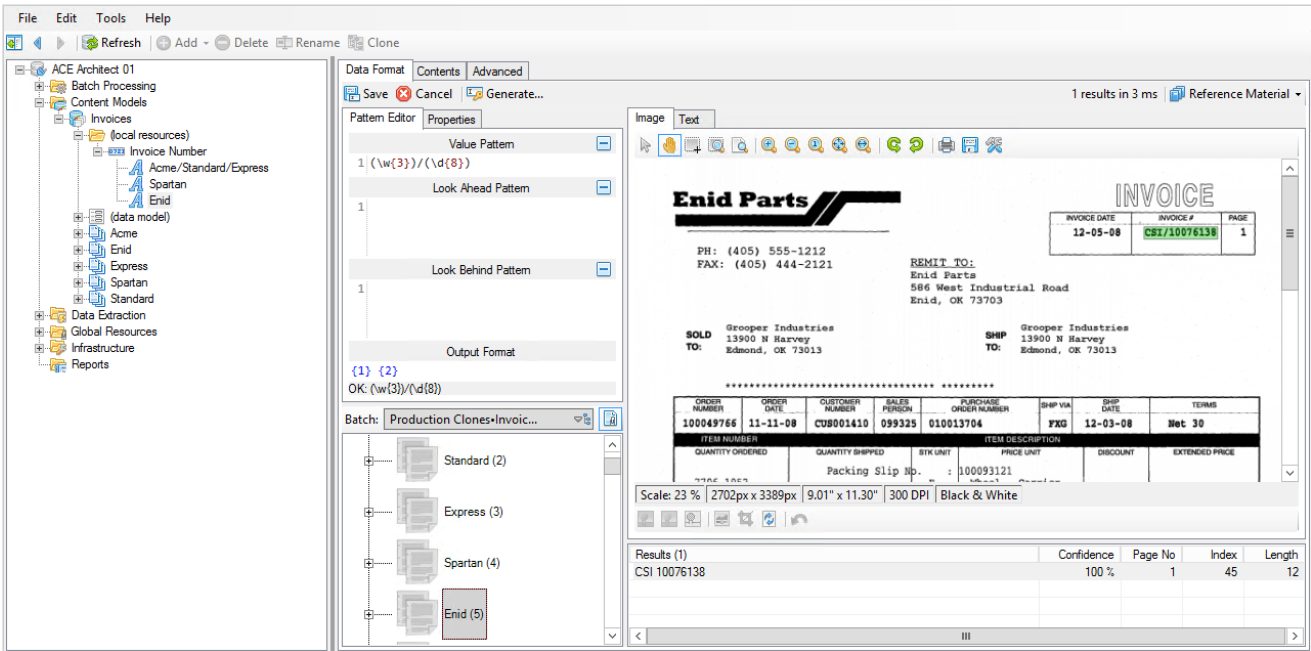

Linking the extractor to the field

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: 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

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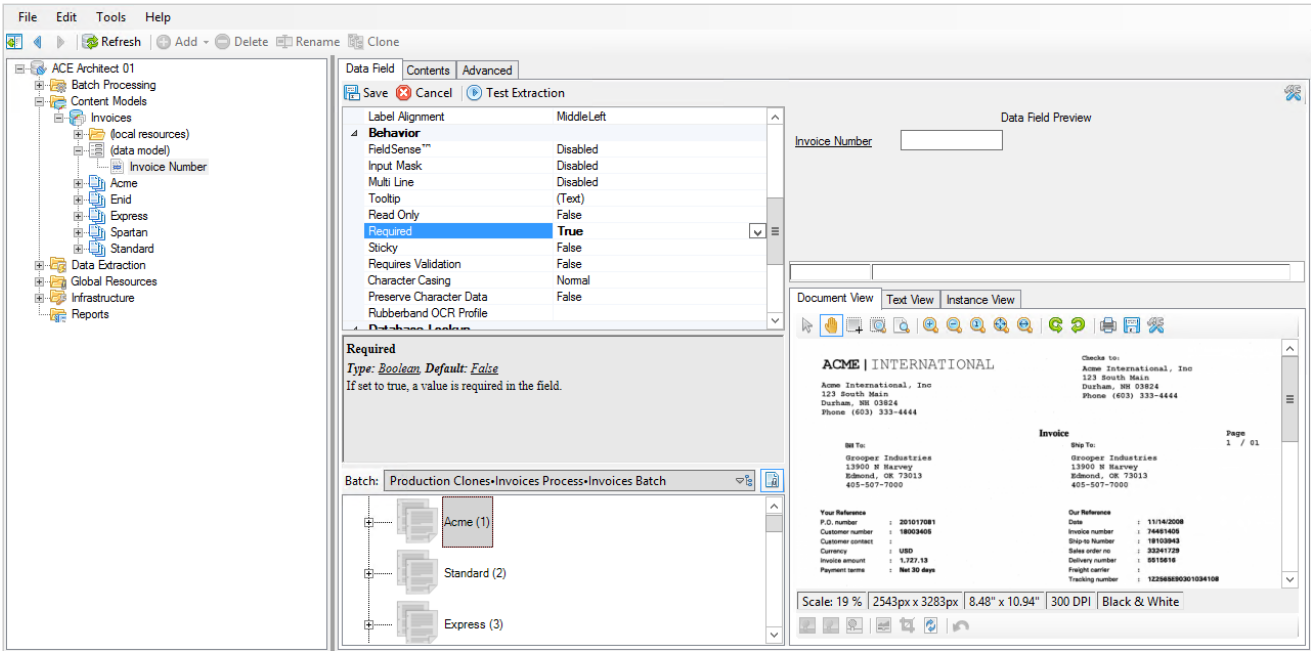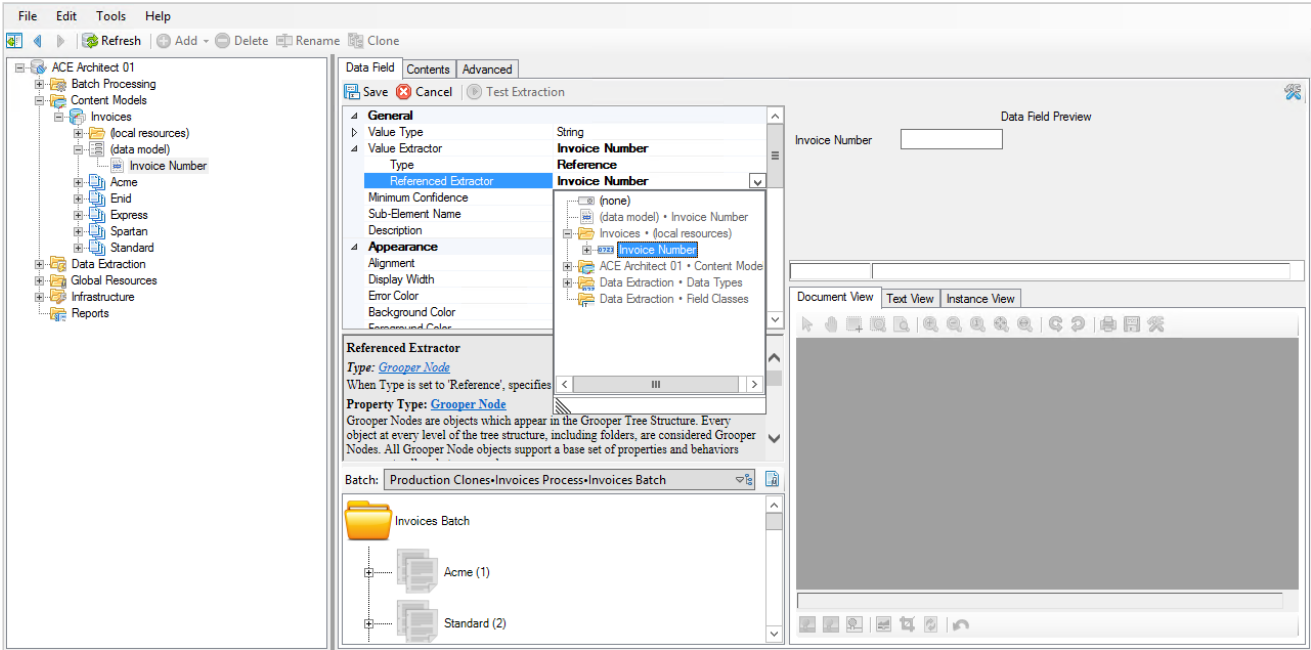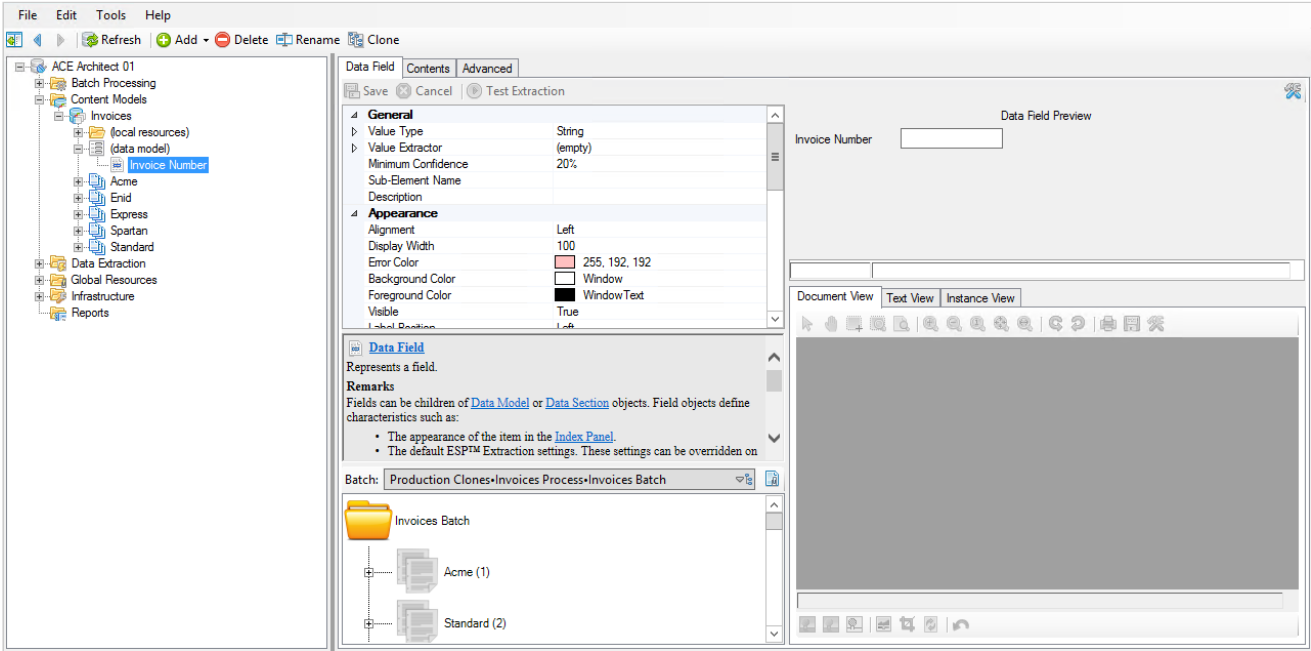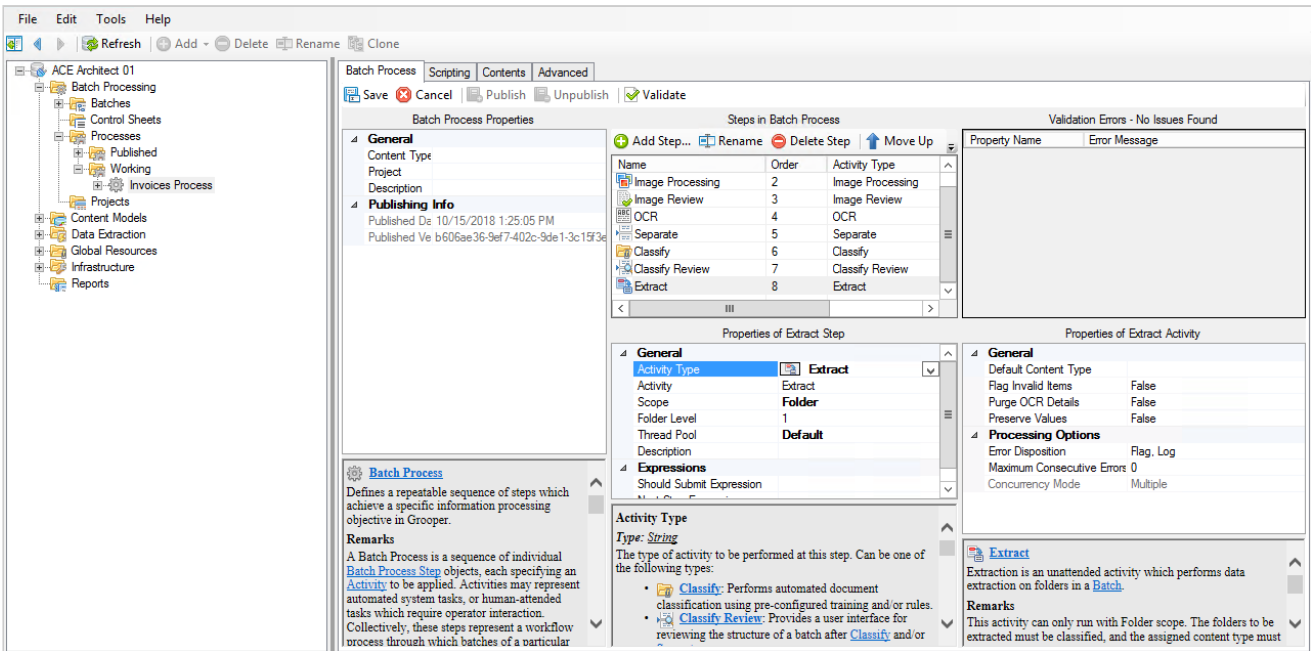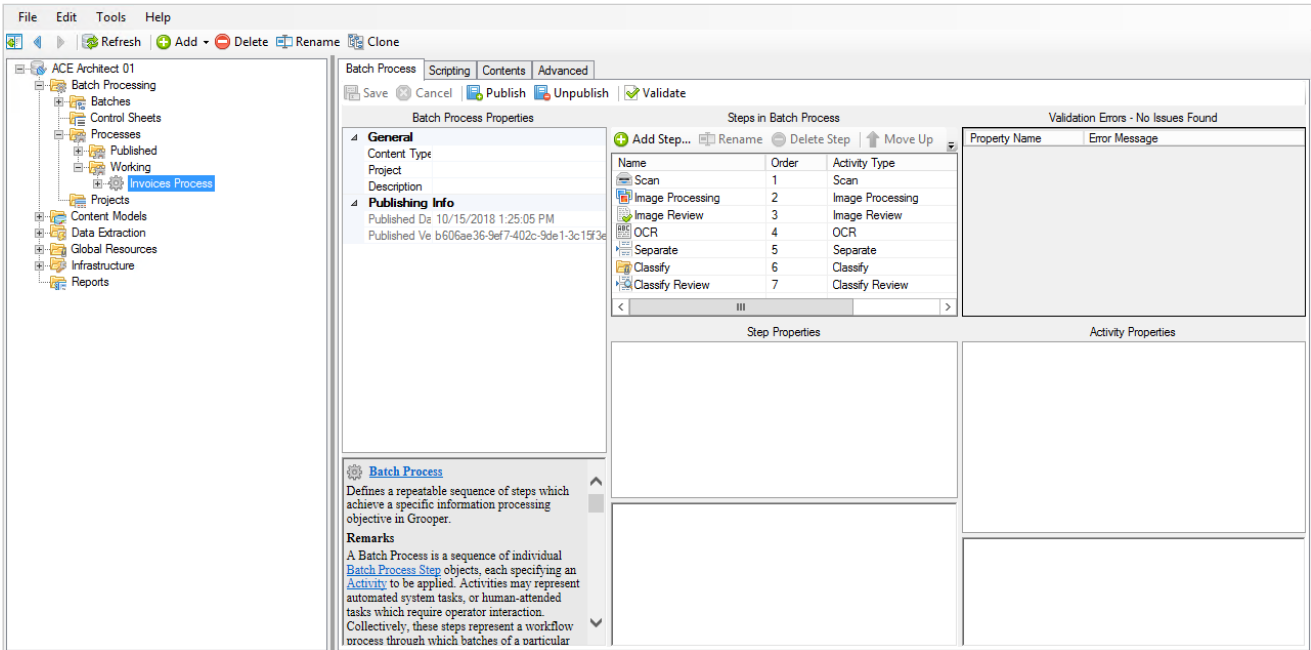
Property	Value
General	
Value Type	String
Value Extractor	(empty)
Minimum Confidence	20%
Sub-Element Name	
Description	
Appearance	
Alignment	Left
Display Width	100
Error Color	255, 192, 192
Background Color	Window
Foreground Color	WindowText
Visible	True
Label Position	Left

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

Tabs: Data Field | Contents | Advanced

Save Cancel Test Extraction

Property	Value
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

Screenshot 3

Tabs: Data Field | Contents | Advanced

Save Cancel Test Extraction

Property	Value
Label Alignment	MiddleLeft
Behavior	
FieldSense™	Disabled
Input Mask	Disabled
Multi Line	Disabled
Tooltip	(Text)
Read Only	False
Required	True
Sticky	False
Requires Validation	False
Character Casing	Normal
Preserve Character Data	False
Rubberband OCR Profile	

Required
Type: Boolean Default: False
If set to true, a value is required in the field.

Batch: Production Clones•Invoices Process•Invoices Batch

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

Data Field Preview
Invoice Number

Document View | Text View | Instance View

ACME | INTERNATIONAL

Checks to:
Acme International, Inc
123 South Main
Durham, NH 03824
Phone (603) 333-4444

Acme International, Inc
123 South Main
Durham, NH 03824
Phone (603) 333-4444

Invoice

Page 1 / 01

Bill To:
Grooper Industries
13900 N Harvey
Edmond, OK 73013
405-507-7000

Ship To:
Grooper Industries
13900 N Harvey
Edmond, OK 73013
405-507-7000

Your Reference		Our Reference	
P.O. number	201017081	Date	11/14/2008
Customer number	18003405	Invoice number	74461405
Customer contact		Ship-to Number	18103043
Currency	USD	Sales order no	33241729
Invoice amount	1,727.13	Delivery number	6615816
Payment terms	Net 30 days	Freight carrier	
		Tracking number	123568930301034108

Scale: 19 % | 2543px x 3283px | 8.48" x 10.94" | 300 DPI | Black & White

Extraction & Data Review

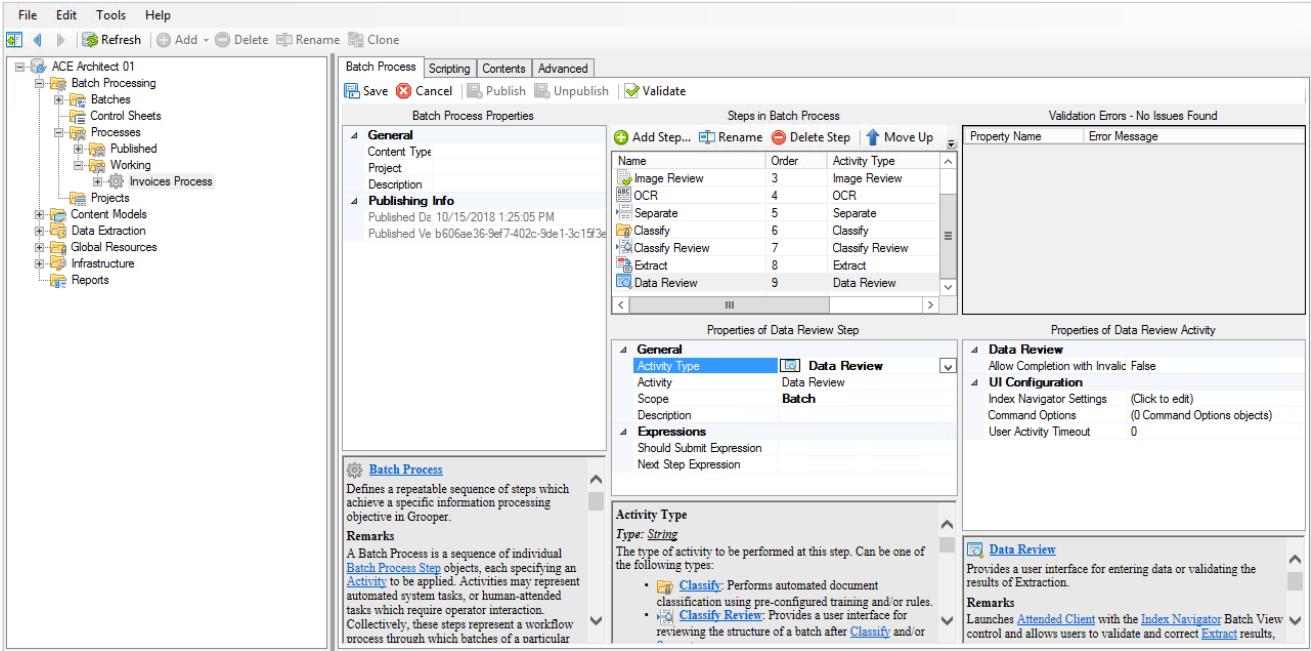## Adding Extract and Data Review steps

> **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
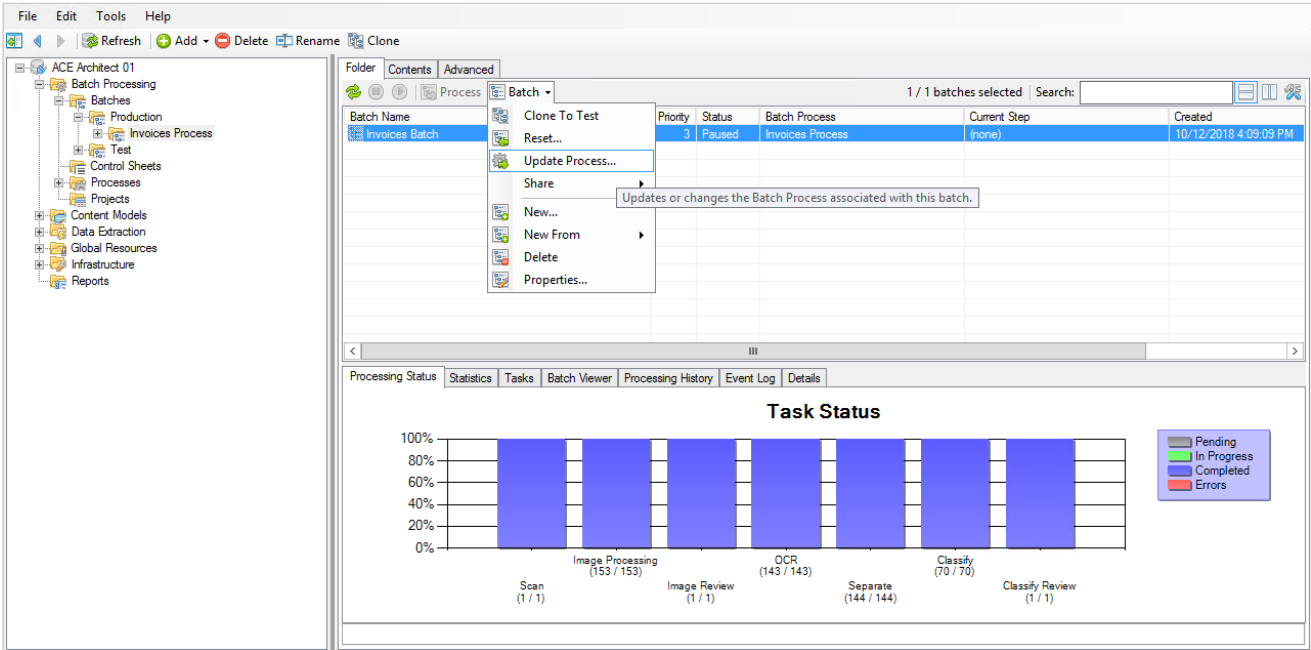
3. Save and Publish

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
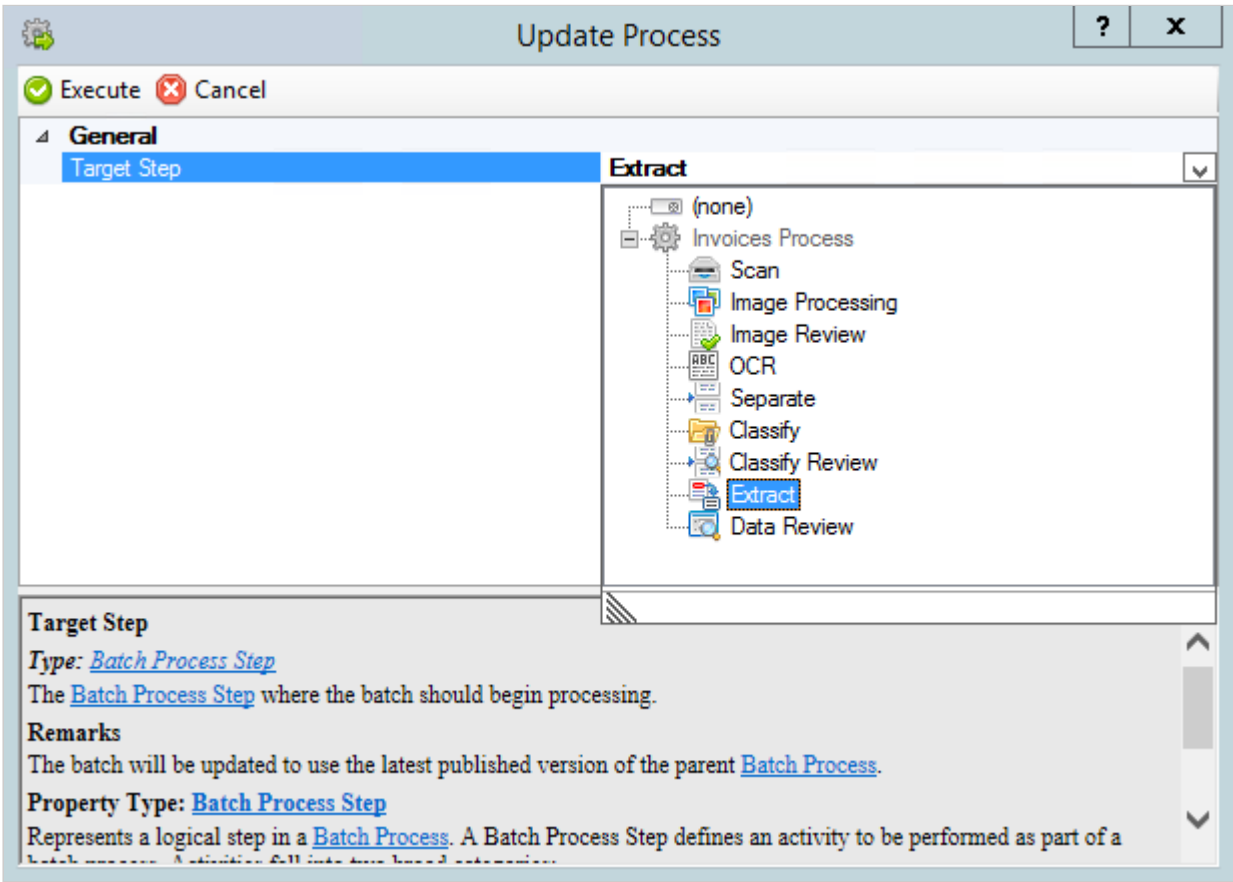
1. Resume the batch

2. Click Process
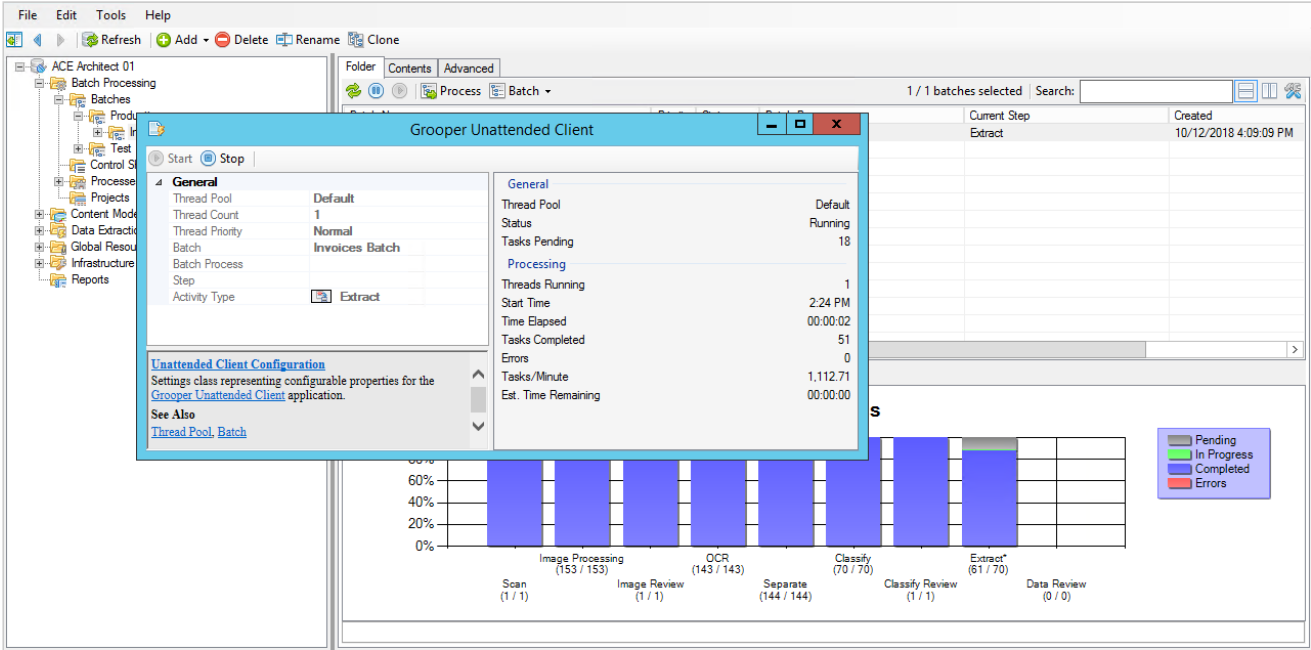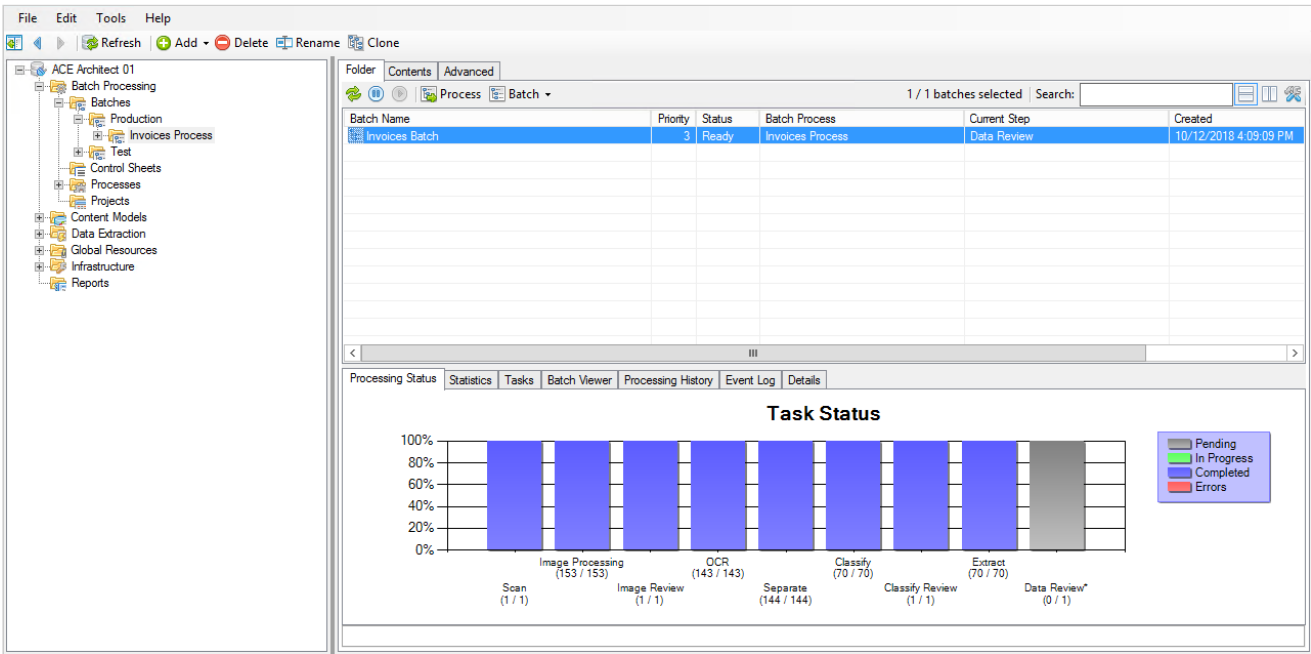
Reviewing extraction results

> **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
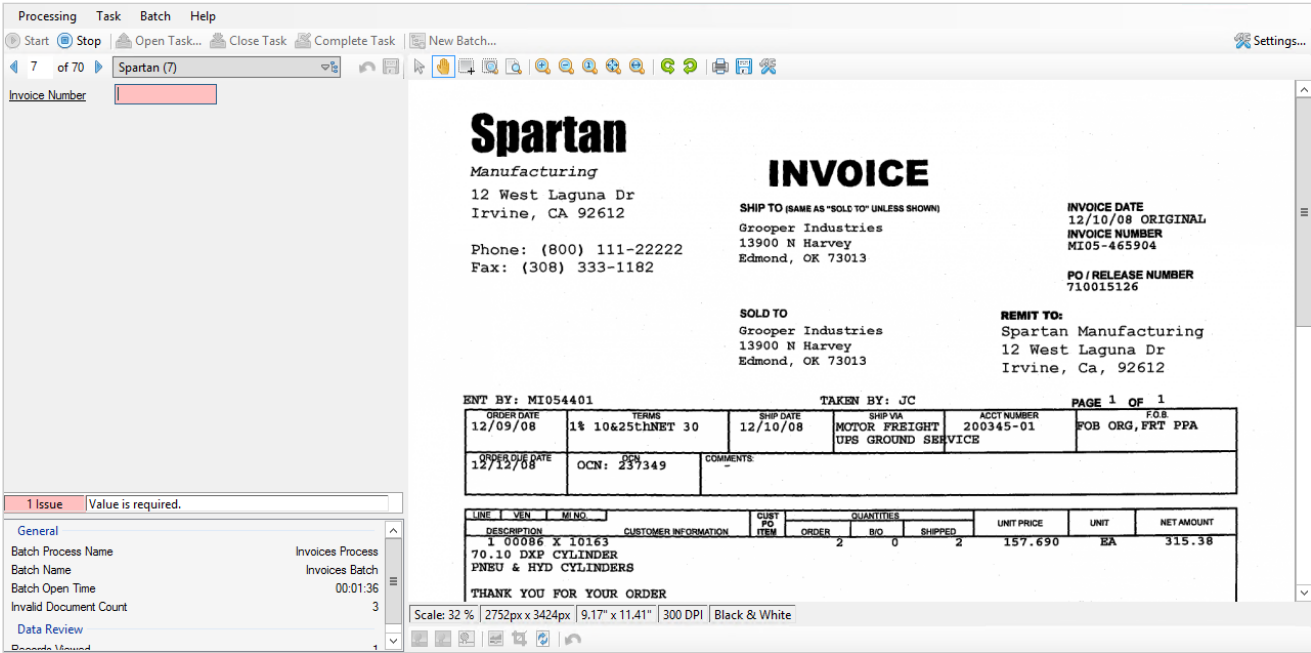
> **Step 2**

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

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

PO / RELEASE 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

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

PO NUMBER: 951001335

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

Spartan
Manufacturing
12 West Laguna Dr
Irvine, CA 92612

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

INVOICE

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

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

Start ● Stop 📂 Open Task... 📄 Close Task ✅ Complete Task | 📋 New Batch...   🔧 Settings...

◄ 62 of 70 ►   ACE Architect 01•Batch Processing•Bat...

Complete the current task.

Invoice Number   WI02-439254

Spartan
Manufacturing

12 West Laguna Dr
Irvine, CA 92612

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

INVOICE

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

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13900 N Harvey
Edmond, OK 73013

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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.
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ORDER DUE DATE	OCN	COMMENTS
11/04/08	OCN: 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										
CPNO: 114027										

No Issues   Field is OK

General
Batch Process Name	Invoices Process
Batch Name	Invoices Batch
Batch Open Time	00:22:56
Invalid Document Count	0

Data Review

Scale: 31 % 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

🔄 ⏸ ⏹ | ▸ Process 📋 Batch ▾   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

| 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) |