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the **science** of document capture

QUICKstart

04

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*Screenshots: 7.5.0.11*



PSI**capture**

# Table Extraction Module

# Quick Start Guide

## Getting Started

### *Welcome to PSICapture!*

**T**his Quick Start Guide is designed to help you through the process of creating a Configuration Profile that uses the Table Extraction Module to extract table data. This guide includes sample images that will be used to configure and test the Configuration Profile. For additional information on features not covered in this guide please refer to the PSIGEN wiki at [help.psigen.com](http://help.psigen.com). PSIGEN offers detailed hands-on training with the PSICapture software as well.

Make sure you have completed the **00 - Installation Quick Start Guide** and used it to get PSICapture installed, licensed and running on your computer before starting with this Guide. You will need to be running version 7.6.x or newer for this guide to be fully effective.



#### **Requirements:**

- Completed **00 - Installation Quick Start Guide**
- Ensure your computer meets the [min. requirements](#)
- Running version 7.6.x of PSICapture or newer
- PSICapture license with Table Extraction module

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## What is Table Extraction?

The Table Extraction Module provides the ability to populate index fields with tabular data based on column headings. The type of data to be extracted from a given column can be fine-tuned both with and without the use of Regular Expressions. The user has the option to allow for multiple rows to appear within a single cell of the table and can also mark certain columns as optional if they may be blank for certain rows.

Column Headings

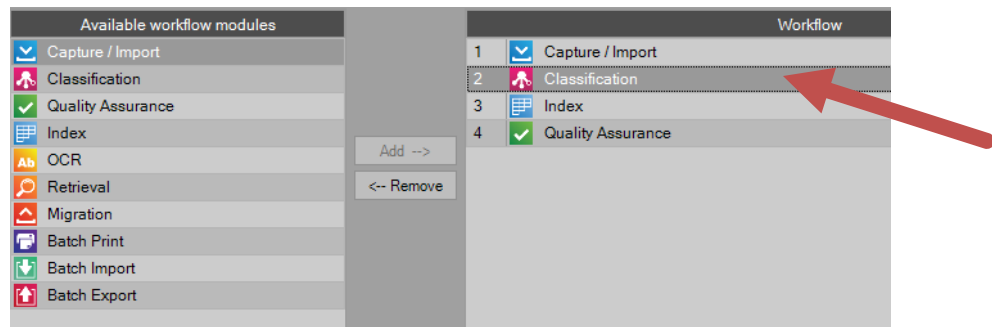
ISLE	31
Inventory No.	Item Description
130008	1/4" x 1/4" IPS Flare Tee
130009	1/4" x 1/4" Union

Row Data

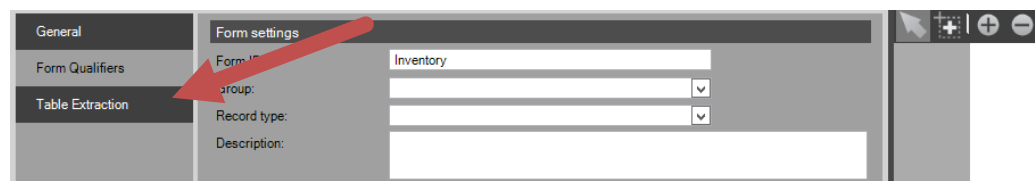
ISLE	31	BIN	Quantity	Location
Inventory No.	Item Description	Purchase Price		
130008	1/4" x 1/4" IPS Flare Tee	\$5.29	1200	R31A8
130009	1/4" x 1/4" Union	\$1.35	2400	R31A9

## Table Extraction Overview

Table Extraction can be configured through the Classification Module of PSIScapture.

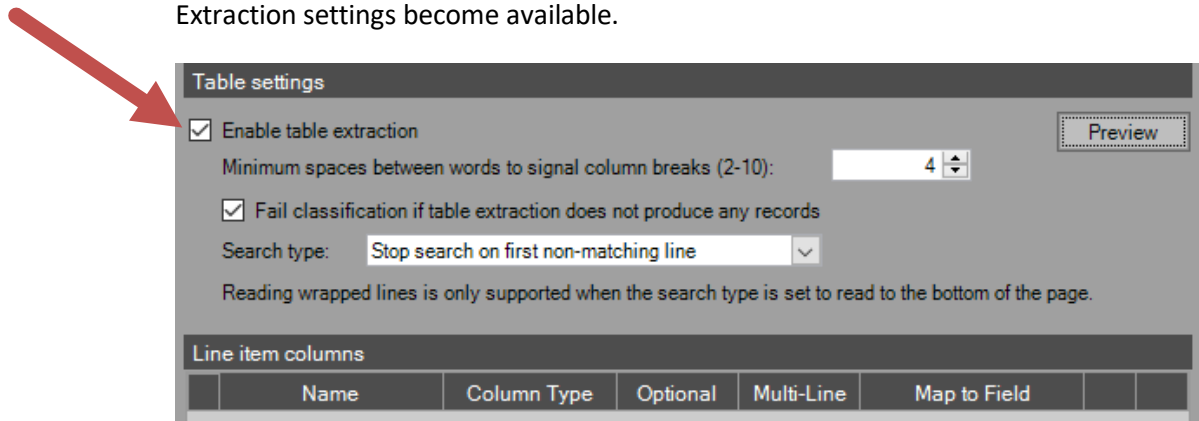


Once a Classification Form Definition is created to identify a document, the **Table Extraction – Line Items** setup can begin.



## TABLE EXTRACTION MODULE QUICK START GUIDE

By default, Table Extraction is disabled on each Form Definition. Once enabled, Table Extraction settings become available.



**Table settings**

☒ Enable table extraction Preview

Minimum spaces between words to signal column breaks (2-10):

☒ Fail classification if table extraction does not produce any records

Search type:

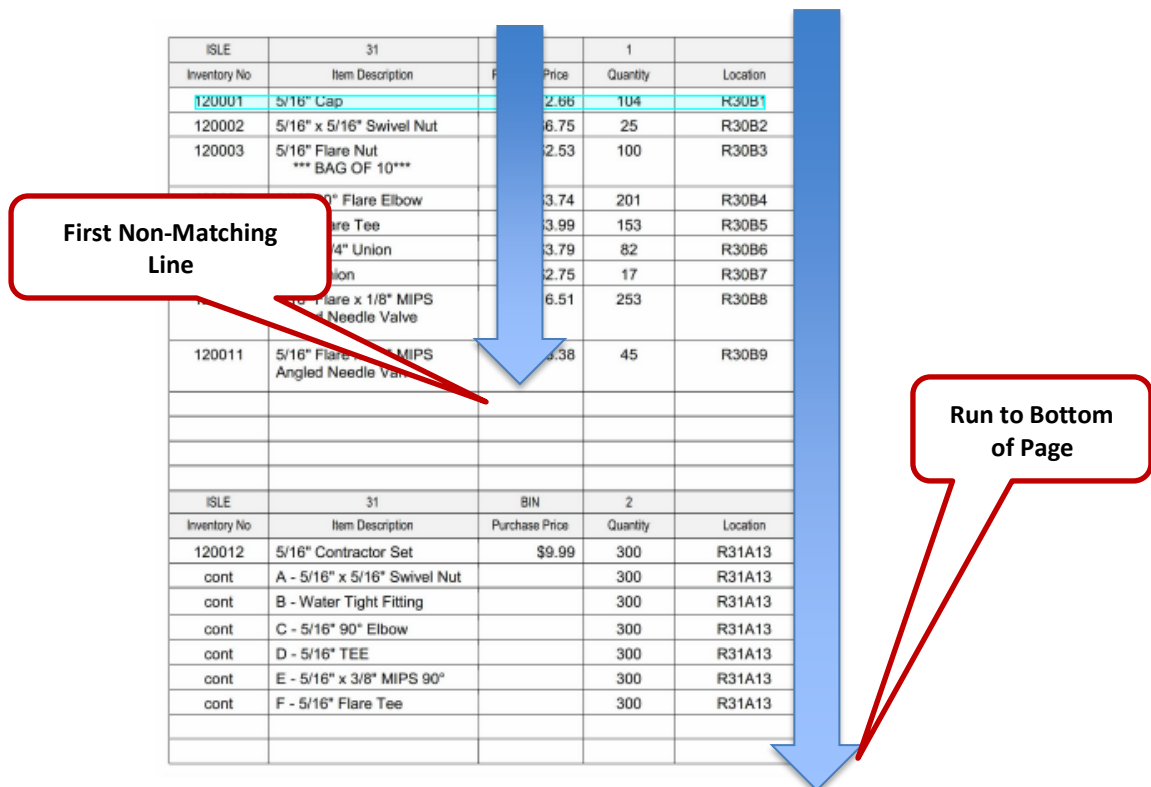
Reading wrapped lines is only supported when the search type is set to read to the bottom of the page.

**Line item columns**

Name	Column Type	Optional	Multi-Line	Map to Field
------	-------------	----------	------------	--------------

Documents can be set to fail in the Classification workflow module if Table Extraction fails to produce any results. Such Exceptions can be corrected manually while processing the documents, or they can be rejected to an Exceptions Batch to be dealt with later. The user can choose to be notified via email when such Exceptions Batches are created, and then access the documents via Batch Manager.

Search type can be set to **Stop search on first non-matching line** or **Search to bottom of page**.



**First Non-Matching Line**

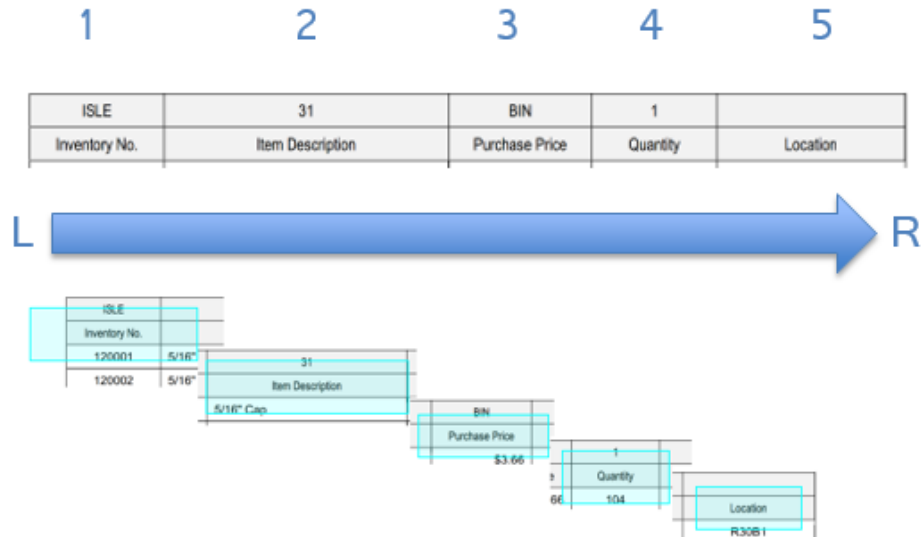
ISLE	31		1	
Inventory No	Item Description	Purchase Price	Quantity	Location
120001	5/16" Cap	2.66	104	R30B1
120002	5/16" x 5/16" Swivel Nut	6.75	25	R30B2
120003	5/16" Flare Nut *** BAG OF 10***	2.53	100	R30B3
	90° Flare Elbow	3.74	201	R30B4
	Flare Tee	3.99	153	R30B5
	1/4" Union	3.79	82	R30B6
	Union	2.75	17	R30B7
	5/16" Flare x 1/8" MIPS Angled Needle Valve	6.51	253	R30B8
120011	5/16" Flare x 1/8" MIPS Angled Needle Valve	3.38	45	R30B9

**Run to Bottom of Page**

ISLE	31	BIN	2	
Inventory No	Item Description	Purchase Price	Quantity	Location
120012	5/16" Contractor Set	\$9.99	300	R31A13
cont	A - 5/16" x 5/16" Swivel Nut		300	R31A13
cont	B - Water Tight Fitting		300	R31A13
cont	C - 5/16" 90° Elbow		300	R31A13
cont	D - 5/16" TEE		300	R31A13
cont	E - 5/16" x 3/8" MIPS 90°		300	R31A13
cont	F - 5/16" Flare Tee		300	R31A13

## TABLE EXTRACTION MODULE QUICK START GUIDE

Column Headings are added to the Configuration starting with the leftmost column and working to the right. All column headings in the table must be included and listed in the correct order for Table Extraction to produce results.



While adding column headings, the software will present options related to Column Type. The user also has the option to specify a custom Value Pattern for the row data in a particular column.

Configure Line Item Column

Column definition

Name:

☐ Optional

☐ Column can wrap over multiple lines

Header pattern options

Header pattern:

Value pattern options

☐ Match Numeric Values  
 The column will contain quantity, currency or other numeric values

☒ Match Text Values  
 The column will contain non-numeric text based data.

☐ Use a custom value pattern  
 Custom pattern:

Character filtering options

Character filter:

All Characters

☐ Enable extended characters

Invalid character action: Remove

Save

Cancel

## TABLE EXTRACTION MODULE QUICK START GUIDE

Using the Auto Regular Expression Builder will allow you to point-and-click the column headings. If you have not yet named your column in the configuration, the value of the Name will be auto-filled with the heading text that you click on the page.



ISLE	31
Inventory No	Item Description
120001	
120002	
120003	
	BAG OF 10

Auto-filled with point-and-click value

**Configure Line Item Column**

Column definition

Name:

☐ Optional

☐ Column can wrap over multiple lines

Header pattern options

Header pattern:

Value pattern options

☐ Match Numeric Values  
The column will contain quantity, currency or other numeric values

☒ Match Text Values  
The column will contain non-numeric text based data.

☐ Use a custom value pattern

The **Map to Field** column determines what Index Field value each piece of column data from a particular row will populate.

Line item columns						
	Name	Column Type	Optional	Multi-Line	Map to Field	
▶	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>	Inventory No	⚙️ 🗑️
	Item Description	Text	<input type="checkbox"/>	<input type="checkbox"/>	Item Description	⚙️ 🗑️
	Purchase Price	Text	<input type="checkbox"/>	<input type="checkbox"/>	Purchase Price	⚙️ 🗑️
	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	⚙️ 🗑️
	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>	Location	⚙️ 🗑️

Add Move Up Move Down

The **Preview** button allows for testing of the configuration without having to save and run the Capture Profile.

## TABLE EXTRACTION MODULE QUICK START GUIDE

### Table settings

☒ Enable table extraction

Minimum spaces between words to signal column breaks (2-10):

☒ Fail classification if table extraction does not produce any records

Search type:

Reading wrapped lines is only supported when the search type is set to read to the bottom of the page.

### Line item columns

	Name	Column Type	Optional	Multi-Line	Map to field		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>	Inventory No		
	Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Item Description		
	Purchase Price	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Purchase Price		
	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>	Quantity		
▶	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>	Location		

Preview is a very powerful tool for debugging Table Extraction.

### Line Item Preview

	Name	Column Type	Optional	Multi-Line	Map to field		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>	Inventory No		
	Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Item Description		
	Purchase Price	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Purchase Price		
	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>	Quantity		
▶	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>	Location		

### Physical Inventory Count Sheet

Sheet No.	IC541222	Date	9-23-15
Performed By	EMP987	Department	Pumping
ISLE	31	BN	1
Inventory No	Item Description	Purchase Price	Quantity
120001	5/16" Cap	\$12.66	104
120002	5/16" x 5/16" Swivel Nut	\$6.75	25
120003	5/16" Flare Nut	\$2.53	100
120004	5/16" 90° Flare Elbow	\$3.74	201
120005	5/16" Flare Tee	\$3.99	153
120006	5/16 x 1/4" Union	\$3.79	82
120007	5/16" Union	\$2.75	17
120010	5/16" Flare x 1/8" MIPS Angled Needle Valve	\$16.51	253
120011	5/16" Flare x 1/4" MIPS Angled Needle Valve	\$13.38	45
ISLE	31	BN	2
Inventory No	Item Description	Purchase Price	Quantity
120012	5/16" Contractor Set	\$9.99	300
cont.	A - 5/16" x 5/16" Swivel Nut		300
cont.	B - Water Tight Fitting		300
cont.	C - 5/16" 90° Elbow		300
cont.	D - 5/16" TEE		300
cont.	E - 5/16" x 3/8" MIPS 90°		300
cont.	F - 5/16" Flare Tee		300
Signature			

Specific options related to row entries per column include the following:

#### Column Type

- **Text** – Column will contain any type of text-based data.
- **Numeric** – Column will contain quantity, currency, or other numeric values only.

#### Custom Value Pattern

- Allows entry of Regular Expression that will match the pattern the software is expecting to find in a column.
  - Can be entered manually, Auto Generated with the Regular Expression builder, or selected from the Global list

#### Optional

- Allows Table Extraction to read through a table even when some entries for a particular column's row may be incomplete or blank

ISLE	31	BIN	2	
Inventory No	Item Description	Purchase Price	Quantity	Location
120012	5/16" Contractor Set	\$9.99	300	R31A13
cont	A - 5/16" x 5/16" Swivel Nut		300	R31A13
cont	B - Water Tight Fitting		300	R31A13
cont	C - 5/16" 90° Elbow		300	R31A13
cont	D - 5/16" TEE		300	R31A13
cont	E - 5/16" x 3/8" MIPS 90°		300	R31A13
cont	F - 5/16" Flare Tee		300	R31A13

#### Multi-Line

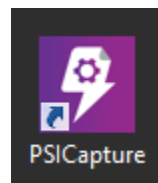
One value,  
Two lines

- Enables the Table Extraction Module to read through multiple lines of data in a single row

120011	5/16" Flare x 1/4" MIPS Angled Needle Valve	\$13.38	45	R30B5
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## Creating your Configuration Profile

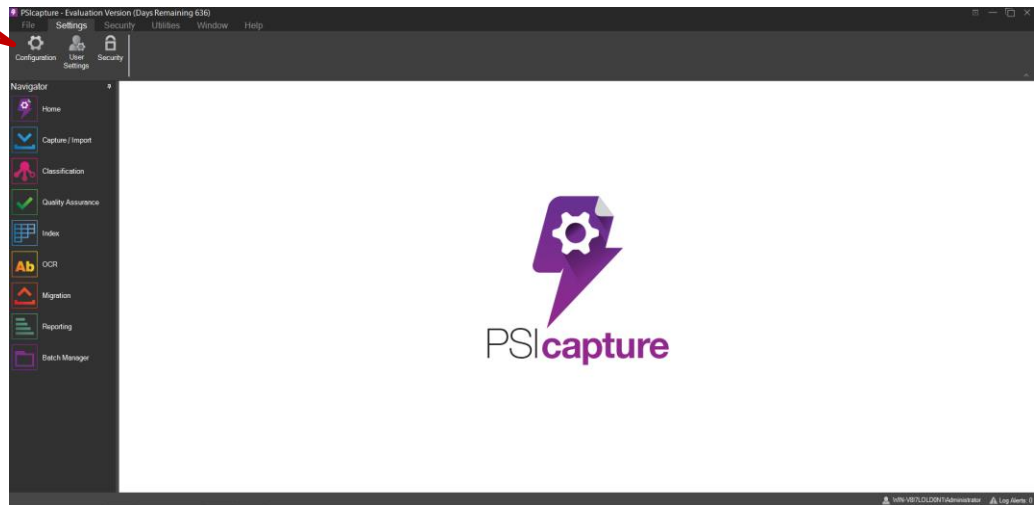
First, you'll need to get a basic Capture Profile Configuration started. Open PSICapture.



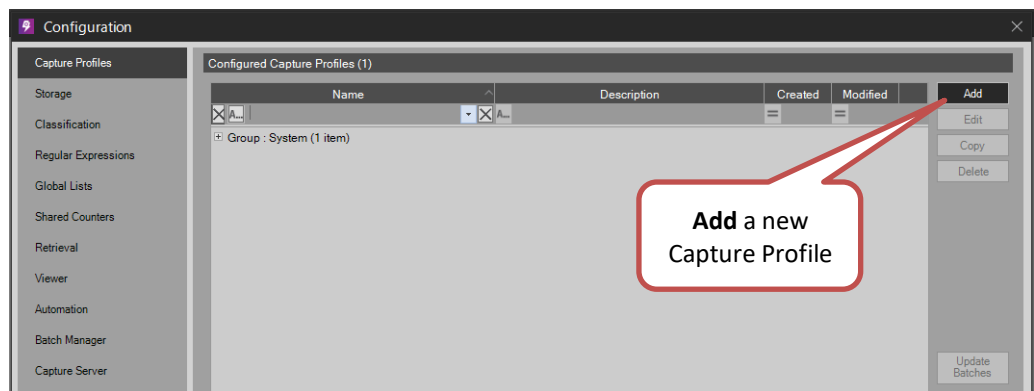


## TABLE EXTRACTION MODULE QUICK START GUIDE

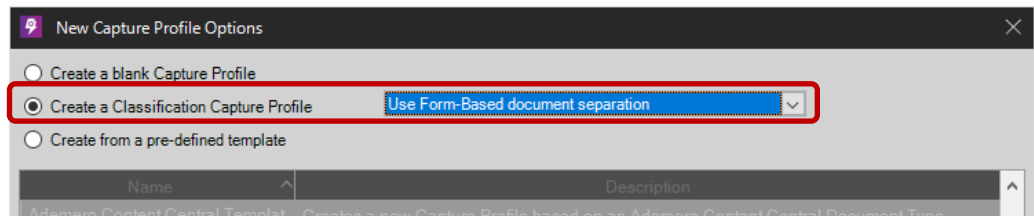
Click to open  
Configuration



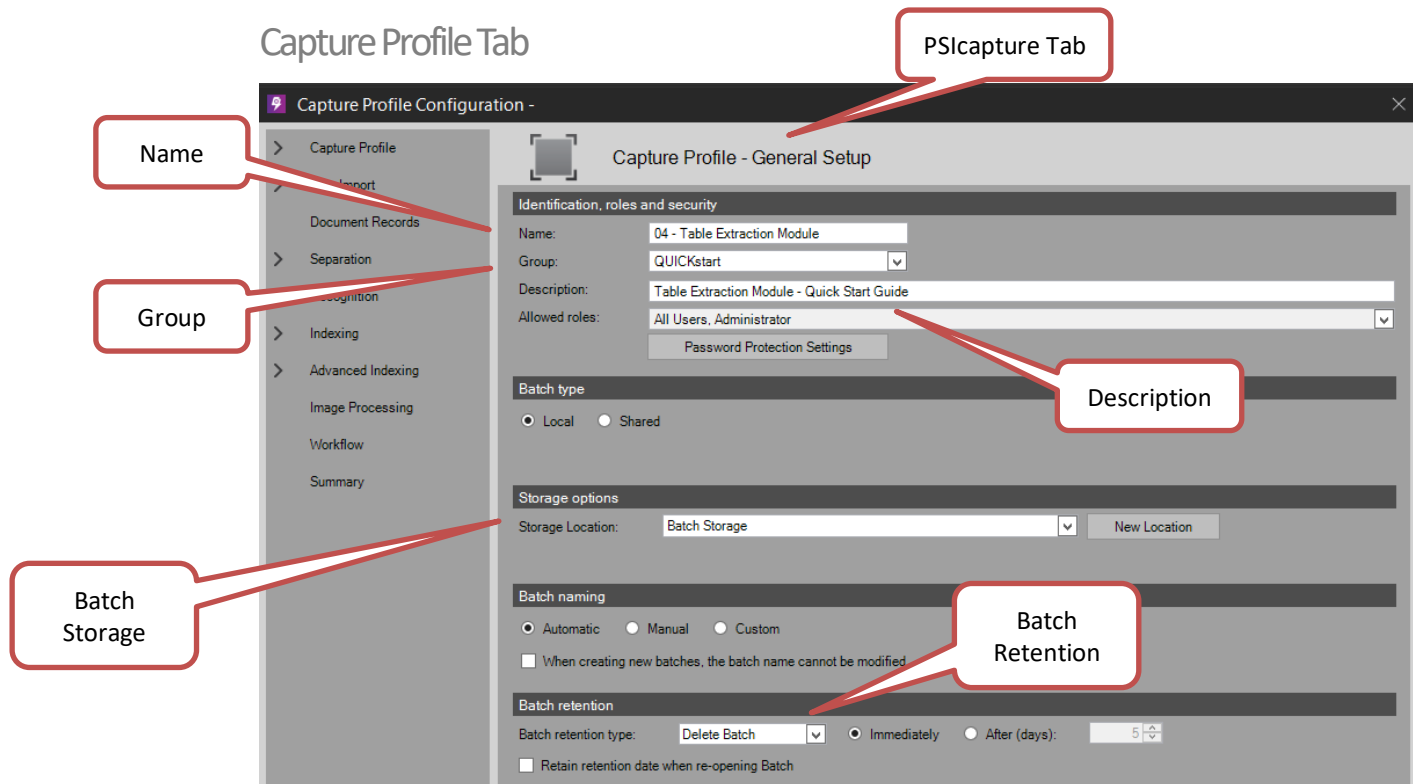
After PSICapture opens you will start in the Configuration module to create the Capture Profile.



Change selection to **Create a Classification Capture Profile** and click **Create**.

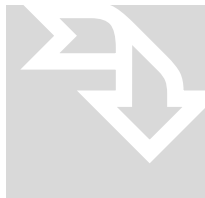


## TABLE EXTRACTION MODULE QUICK START GUIDE



Give your new Capture Profile a name, group, and description. Confirm your Batch Storage Location and set your Batch Retention.

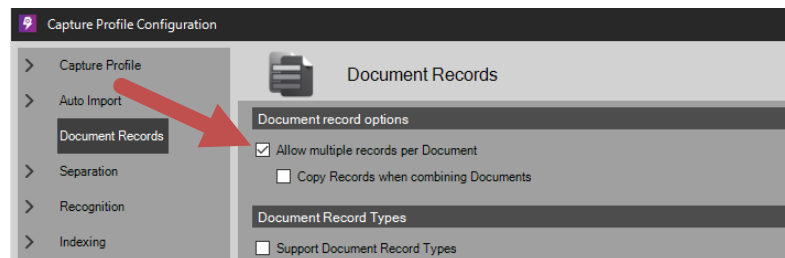
### Auto Import Tab



For the purpose of this Quick Start Guide you will not be making any changes to Auto Import or its sub tabs. Many of the features within PSICapture Capture Profile Configurations can be left at their default settings. For additional information about features available on this tab please refer to the PSIGEN [Help](#).

### Document Records Tab

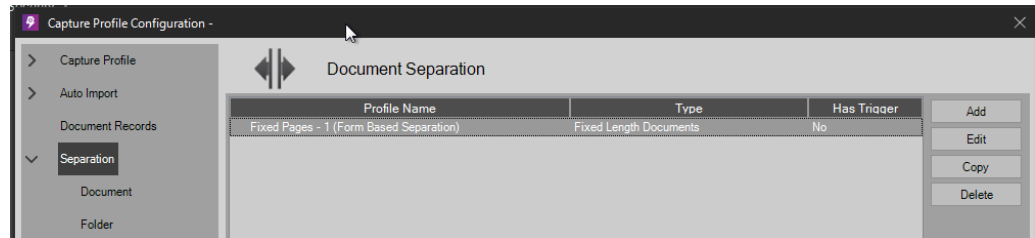
Check the top checkbox for "Allow multiple records per document".



## Separation Tab

★ Note:  
Separation profiles are unique to each Capture Profile.

When you first began creating this Capture Profile (see Page 8), you selected the option to **Create a Classification Capture Profile**. This change automatically configured the needed separation profile as Fixed Pages – 1 (Form Based Separation).



## Recognition Tab

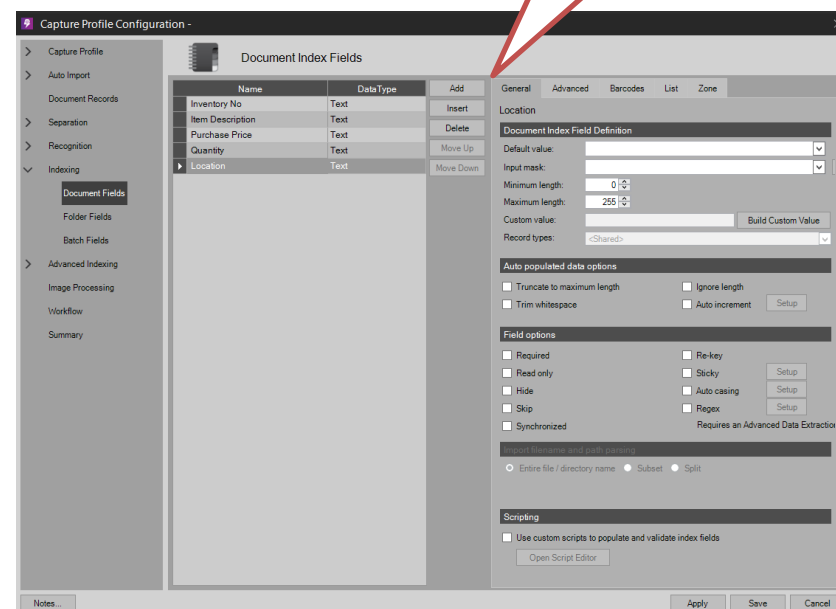
No barcode or other recognition engines are being used in this guide, so you can skip this tab.

## Indexing Tab

Click the **Add** button on the middle of the window 5 times to create 5 blank index fields. Name those index fields as follows:

- Inventory No
- Item Description
- Purchase Price
- Quantity
- Location

Click **Add** 5 times (*once for each field*)



You do not need to make any other changes on Indexing, as these fields will be populated using the Table Extraction Module, which is configured from the Classification Settings window in the Workflow tab.

## Advanced Indexing Tab

Since no changes are required here, you can skip this tab.

## Image Processing Tab

Since no changes are required here, you can skip this tab as well.

## Workflow Tab

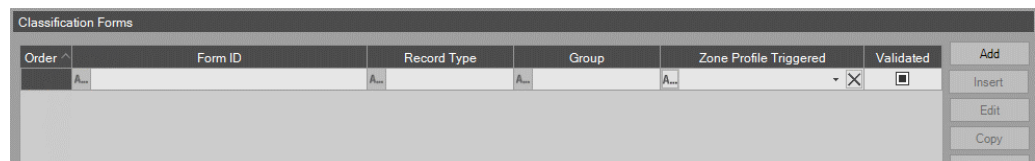
Proceed to the Workflow tab, where you will configure the Classification workflow module to recognize the different types of documents.

Select the **Classification** workflow module from the list on the *right* and click the **Configure** button to edit this module.

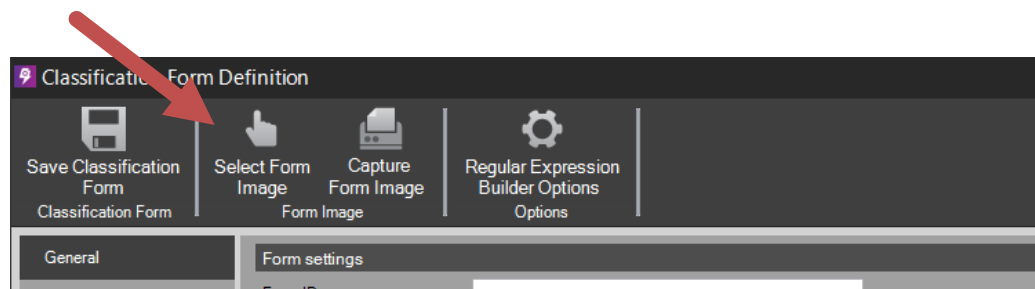
*The change you made when first creating the Capture Profile (see page 8), to **Create a Classification Capture Profile** automatically added the Classification Module to this workflow.*

From the **Classification Settings** window, click the **Add** button to add a new Form Definition.

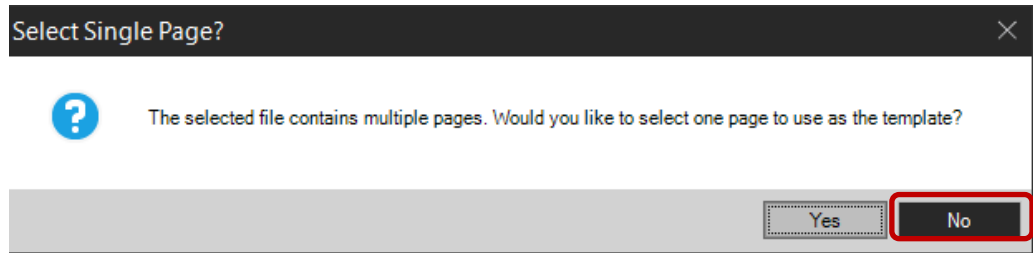
Click Add



Import the sample file **04 – Table Extraction Module Sample.tif**



Select the **No** button to import all pages of the sample.



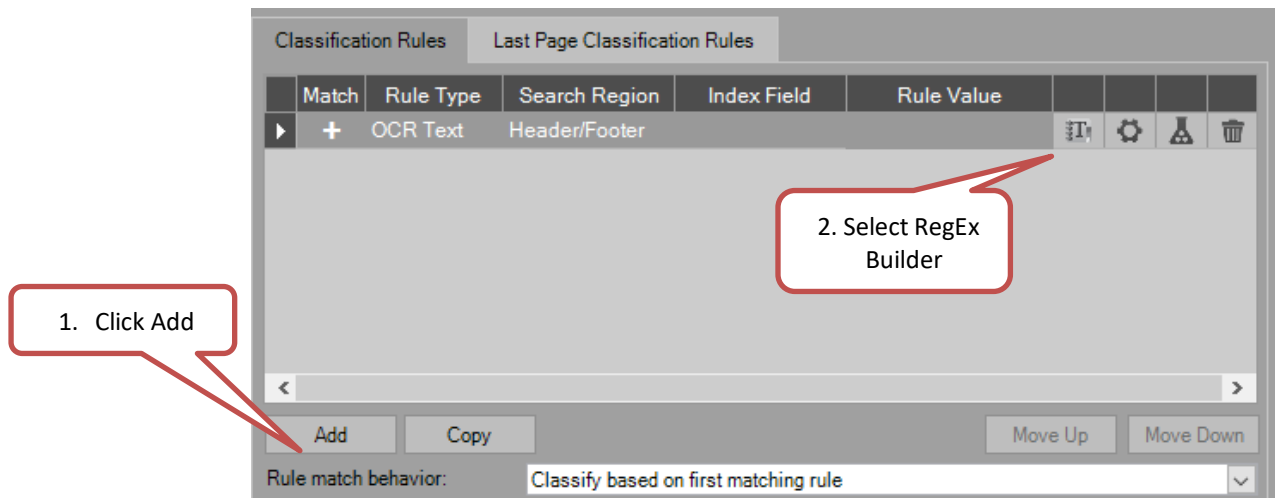
Enter the Form ID name as **Physical Inventory Count Sheet**.

A "Form settings" dialog box with the following fields:

- Form ID: A text input field containing "Physical Inventory Count Sheet", which is highlighted with a red rectangular border.
- Group: A dropdown menu.
- Record type: A dropdown menu.
- Description: A large text area.
- Page count: A numeric input field with the value "2" and up/down arrows.
- Usage ranking behavior: A dropdown menu with "Use Ranked position" selected.

Next Add a Classification Rule to identify the document. For this document you will use the Title as the rule.

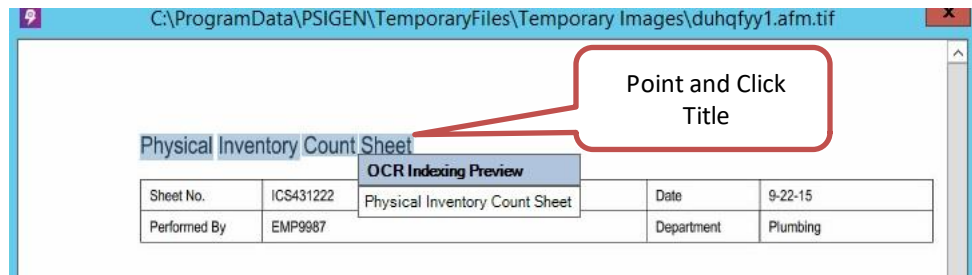
Click **Add**, Select the Regular Expression Builder tool, and point-and-click the document title.



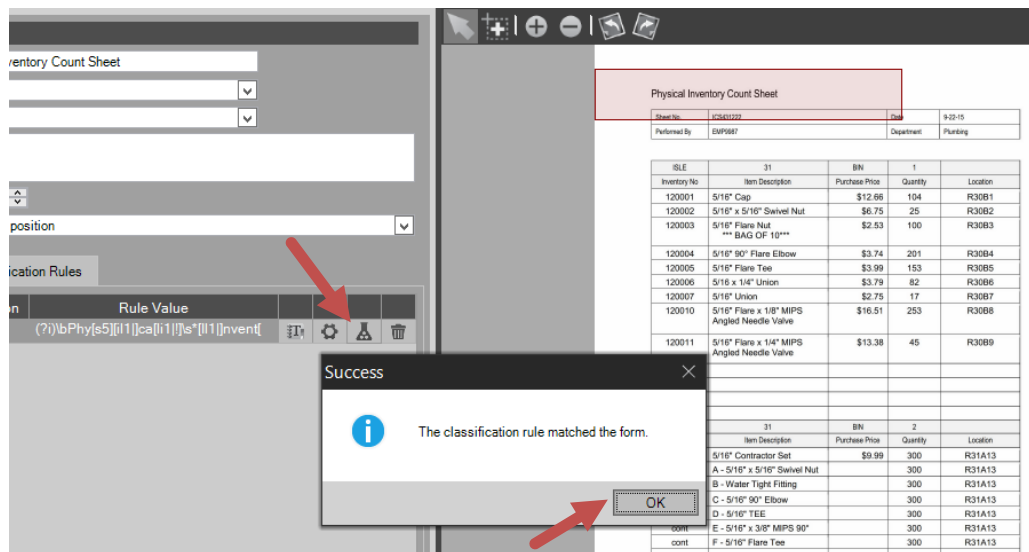
## TABLE EXTRACTION MODULE QUICK START GUIDE

### ☆ Note:

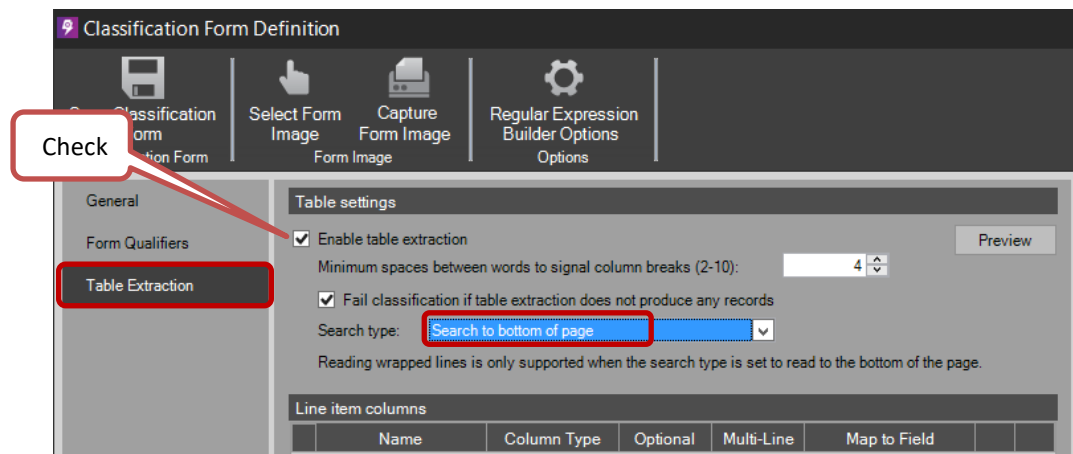
To point-and-click multiple words, click the first word, then drag across the remaining words before releasing the mouse button.



Test the rule value by pressing the beaker icon. Press OK on the Success message.



Next you will Select the **Table Extraction – Line Items** tab. **Enable Table Extraction** and set the Search Type to **Search to bottom of page**.



## TABLE EXTRACTION MODULE QUICK START GUIDE

Now you will add an entry for each column heading, one at a time, starting from the left and moving right.

Click **Add**

**Table settings**

☒ Enable table extraction Preview

Minimum spaces between words to signal column breaks (2-10):

☒ Fail classification if table extraction does not produce any records

Search type:

Reading wrapped lines is only supported when the search type is set to read to the bottom of the page.

**Line item columns**

Name	Column Type	Optional	Multi-Line	Map to Field
------	-------------	----------	------------	--------------

**Add** Move Up Move Down

Point and Click the first Column Heading named Inventory No.

ISLE	31
Inventory No	Item Description
120001	5/16" Cap
120002	OCR Indexing Preview
120003	Inventory No

Auto Populated based on Point and Click OCR value

**Configure Line Item Column**

**Column definition**

Name:

☐ Optional

☐ Column can wrap over multiple lines

**Header pattern options**

Header pattern:

**Value pattern options**

☐ Match Numeric Values  
The column will contain quantity, currency or other numeric values

☒ Match Text Values

Click **Save**

Repeat steps above to Add remaining Column Headings:

- Item Description
- Purchase Price
- Quantity
- Location

### Table settings

☒ Enable table extraction
 

Minimum spaces between words to signal column breaks (2-10):
 

4

☒ Fail classification if table extraction does not produce any records

Search type:
 

Search to bottom of page

Reading wrapped lines is only supported when the search type is set to read to the bottom of the page.

Preview

### Line item columns

	Name	Column Type	Optional	Multi-Line	Map to field		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>			
	Item Description	Text	<input type="checkbox"/>	<input type="checkbox"/>			
	Purchase Price	Text	<input type="checkbox"/>	<input type="checkbox"/>			
	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>			
▶	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>			

Click the **Preview** button.

### Table settings

☒ Enable table extraction
 

Minimum spaces between words to signal column breaks (2-10):
 

4

☒ Fail classification if table extraction does not produce any records

Search type:
 

Search to bottom of page

Reading wrapped lines is only supported when the search type is set to read to the bottom of the page.

Preview

Data is present but there are issues; values are missing, only single row data is present, and repeated column heading rows are listed as results.



TABLE EXTRACTION MODULE  
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Line Item Preview

Columns		
Name	Text	Alt. Text
Inventory No	ISLE	
Item Description	31	
Purchase Price	BIN	
Quantity	Quantity	
Location	Location	

Lines				
Inventory No	Item Description	Purchase Price	Quantity	Location
120001	5/16" Cap	12.66	104	R3081
120002	5/16" x 5/16" Swivel Nu	6.75	25	R3082
	5/16" Flare Nut	2.53	100	R3083
120004	5/16" 90° Flare Elbow	3.74	201	R3084
120005	5/16" Flare Tee	3.99	153	R3085
120006	5/16 x 1/4" Union	3.79	82	R3086
120007	5/16" Union	2.75	17	R3087
120010	5/16" Flare x 1/8" MIPS	16.51	253	R3088
120011	5/16" Flare x 1/4" MIPS	13.38	45	R3089
Inventory No	Item Description	Purchase Price	Quantity	Location
120012	5/16" Contractor Set	9.99	300	R31A13

Missing Second  
Line of  
Description



Unwanted  
Values

Missing  
Values

Close the Preview by clicking the X in the upper-right corner.

To ensure the desired data is extracted from the table, the entry for each column should be configured to match the expected data type, and/or to match the expected RegEx value patterns.

You will specify the type of values that would be considered acceptable for each column, starting with **Inventory No**. Open the Configuration window by selecting the Gear icon on the right.

Name	Column Type	Optional	Multi-Line	Map to Field		
Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>			

Some entries will contain a 6-digit number and others will be continuations of a previous Inventory Number listed as “cont.” For this column, add a Custom Value Pattern to match either the digits or the word “cont.”

Custom Value Pattern: `\d{6}|cont`

Configure Line Item Column

Column definition

Name:

☐ Optional

☐ Column can wrap over multiple lines

Header pattern options

Header pattern:

Value pattern options

☐ Match Numeric Values  
The column will contain quantity, currency or other numeric values

☒ Match Text Values  
The column will contain non-numeric text based data.

☒ Use a custom value pattern  
Custom pattern:

Click **Save**

Next you will configure **Item Description** to allow for the presence of multiple lines. Check the Multi-Line option for this column.

	Name	Column Type	Optional	Multi-Line	Id		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙️	🗑️
✎	Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>		⚙️	🗑️
	Purchase Price	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙️	🗑️
	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙️	🗑️
	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙️	🗑️

The **Purchase Price** is not always listed and needs to be set to **Optional**. The data in this column are Currency values, so set the data type to **Match Numeric Values**.

**Configure Line Item Column**

**Column definition**

Name:

☒ Optional Check

☐ Column can wrap over multiple lines

**Header pattern options**

Header pattern:  Select

**Value pattern options**

☒ Match Numeric Values  
The column will contain quantity, currency or other numeric values

☐ Match Text Values  
The column will contain non-numeric text based data.

☐ Use a custom value pattern

You can also change the Column Type using the dropdown in the list of columns. Use this method to set **Quantity** to Numeric, as shown below.

	Name	Column Type	Optional	Multi-Line	Map to Field		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙	🗑
	Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>		⚙	🗑
	Purchase Price	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>		⚙	🗑
▶	Quantity	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙	🗑
	Location	Numeric	<input type="checkbox"/>	<input type="checkbox"/>		⚙	🗑
		Text					

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For **Location** you will specify a custom Value Pattern matching only entries that consist of a capital R followed by between 4 and 5 alphanumeric characters.

Custom Value Pattern:

**R\w{4,5}**

**Configure Line Item Column**

Column definition

Name:

☐ Optional

☐ Column can wrap over multiple lines

Header pattern options

Header pattern:

Value pattern options

☐ Match Numeric Values  
The column will contain quantity, currency or other numeric values

☒ Match Text Values  
The column will contain non-numeric text based data.

☒ Use a custom value pattern  
Custom pattern:

Once all Column Headings are configured press **Preview** again to verify results.

Lines				
Inventory No	Item Description	Purchase Price	Quantity	Location
120001	5/16" Cap	\$12.66	104	R3081
120002	5/16" x 5/16" Swivel Nu	\$6.75	25	R3082
120003	5/16" Flare Nut BAG O	\$2.53	100	R3083
120004	5/16" 90° Flare Elbow	\$3.7	201	R3084
120005	5/16" Flare Tee	\$3.9		R3085
120006	5/16 x 1/4" Union	\$3.7		R3086
120007	5/16" Union	\$2.7		R3087
120010	5/16" Flare x 1/8" MIPS	\$16.51	253	R3088
120011	5/16" Flare x 1/4" MIPS	\$13.38	45	
120012	5/16" Contractor Set	\$9.99	300	
cont	A - 5/16" x 5/16" Swivel		300	
cont	B - Water Tight Fitting		300	R31A13
cont	C - 5/16" 90° Elbow		300	R31A13
cont	D - 5/16" TEE		300	R31A13
cont	E - 5/16" x 3/8" MIPS 9		300	R31A13
cont	F - 5/16" Flare Tee		300	R31A13

Second Line now included

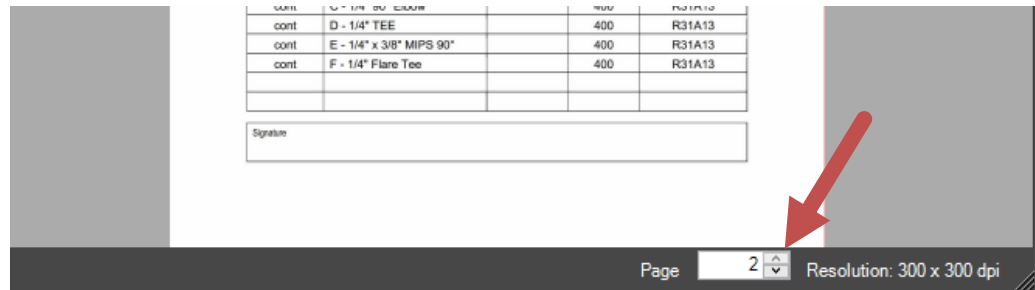
Items marked as Optional

View Page Text View OCR Details

Once the results are validated, close the Preview window.

# TABLE EXTRACTION MODULE QUICK START GUIDE

Next you will check that the Table Extraction settings work with Page 2. Change the sample to Page 2 by clicking the arrow in the lower right of the window.



Now click **Preview**.

Columns		
Name	Text	Alt. Text
Inventory No	ISLE	ISLE 31 BIN 3
Item Description	31	ISLE 31 BIN 3
Purchase Price	BIN 3	ISLE 31 BIN 3
Quantity	3	
Location		

When column headings cannot be found the Preview window will display the missing items highlighted in red. Close the Preview window and click through each column entry. Notice that the blue zones are not large enough to cover the headings on the second page. Simply expand the zone boxes to correct for this problem. Do not drag zones, only adjust the heights.

Click

Name	Column Type	Optional	Multi-Line	Map to Field		
Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>			
Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Purchase Price	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Quantity	Numeric	<input type="checkbox"/>	<input type="checkbox"/>			
Location	Text	<input type="checkbox"/>	<input type="checkbox"/>			

ISLE	31	BIN
Inventory No	Item Description	Purchase Price
130008	1/4" x 1/4" IPS Flare Tee	\$5.29

Before fix – blue zone not tall enough

ISLE	31	BIN
Inventory No	Item Description	Purchase Price
130008	1/4" x 1/4" IPS Flare Tee	\$5.29

After fix – blue zone covers heading

TABLE EXTRACTION MODULE  
QUICK START GUIDE

Repeat for each non-matching Column Header zone on Page 2, then Preview.

Lines				
Inventory No	Item Description	Purchase Price	Quantity	Location
▶ 130008	1/4" x 1/4" 1 PS Flare	\$5.29	1200	R31A8
130009	1/4" x 1/4" Union	\$1.35	2400	R31A9
130010	1/4" Plug BAG OF 10	\$1.83	2600	R31A10
130012	1/4" x 1/8" FIPS Adapt	\$2.35	900	R31A12
130013	1/4" Contractor Set Ver	\$9.99	400	R31A13
cont	A - 1/4" x 1/4" Swivel		400	R31A13
cont	B - 1/4" Flare Nut		400	R31A13
cont	C - 1/4" 90° Elbow		400	R31A13
cont	D - 1/4" TEE		400	R31A13
cont	E - 1/4" x 3/8" MIPS 9		400	R31A13
cont	F - 1/4" Flare Tee		400	R31A13

View Page Text
View OCR Details

Once results are available in the Preview of Page 2, close and re-test Page 1. When all pages are verified, close Preview.

Next you will map each row data to the corresponding Index Field.

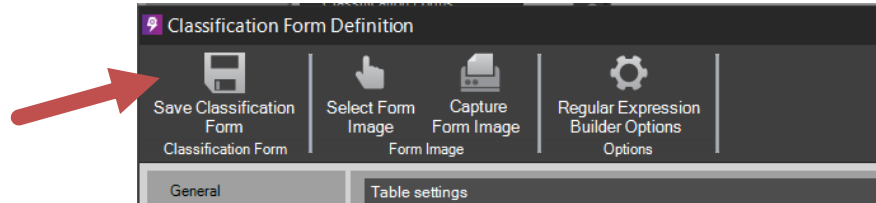
Use the Map to Field dropdown to select the appropriate Index Field to populate with column data.

	Name	Column Type	Optional	Multi-Line	Map to Field		
	Inventory No	Text	<input type="checkbox"/>	<input type="checkbox"/>	Inventory No	⚙	🗑
	Item Description	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Item Description	⚙	🗑
	Purchase Price	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Purchase Price	⚙	🗑
	Quantity	Numeric	<input type="checkbox"/>	<input type="checkbox"/>	Quantity	⚙	🗑
▶	Location	Text	<input type="checkbox"/>	<input type="checkbox"/>		⚙	🗑

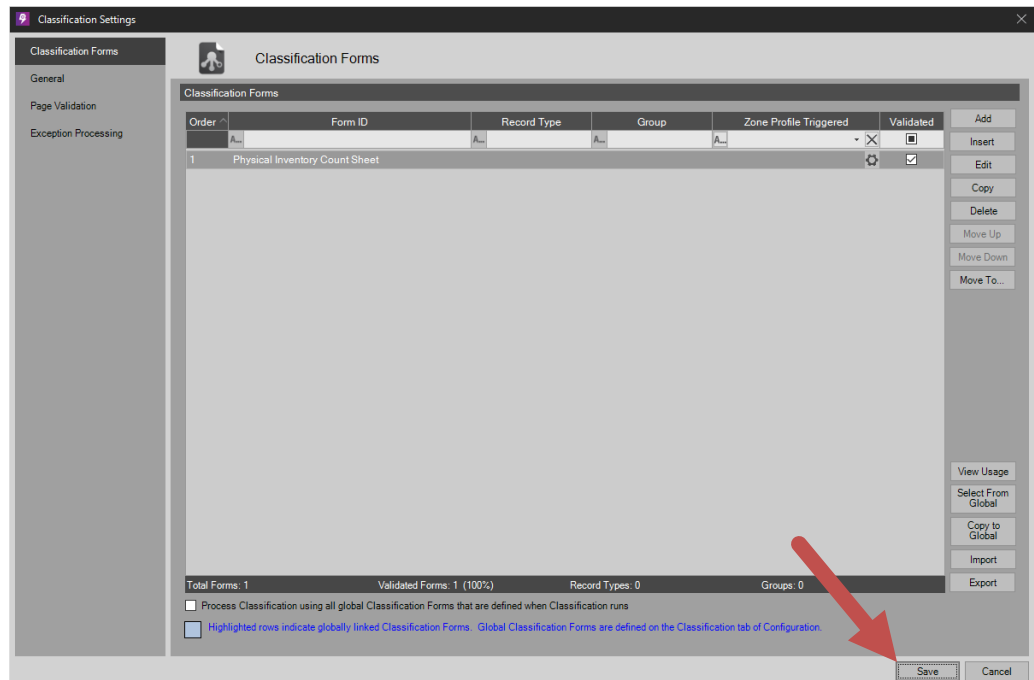
Inventory No  
Item Description  
Purchase Price  
Quantity  
Location

## TABLE EXTRACTION MODULE QUICK START GUIDE

Save the Classification Form Definition.

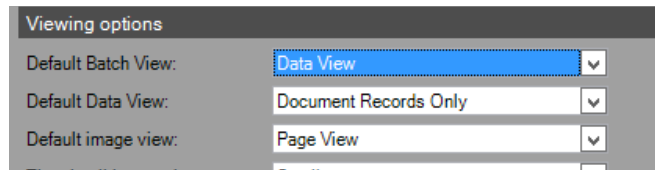


Save Classification Settings

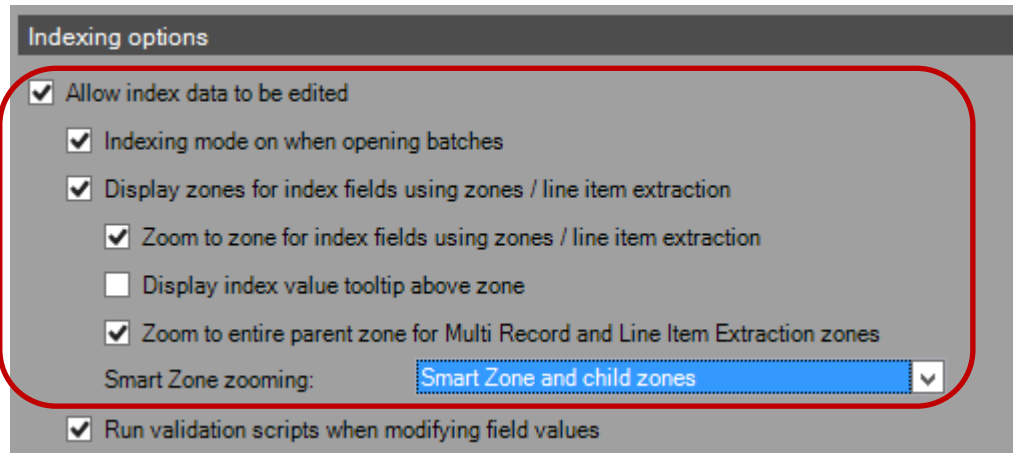


Back in the root of the Profile Configuration you will finish building your Workflow. Because the Table Extraction module runs during Classification, you will not need an Index module for this workflow. If we were also reading other index values configured with zones we would need an Indexing module set to “Attempt to Auto Index Batch”.

You will include a QA module from which to review the results. Select **Quality Assurance** from the left and click **Add**. Change the Default Batch View from Tree View to **Data View**. This will cause extracted values to be displayed when you enter the Quality Assurance workflow module.

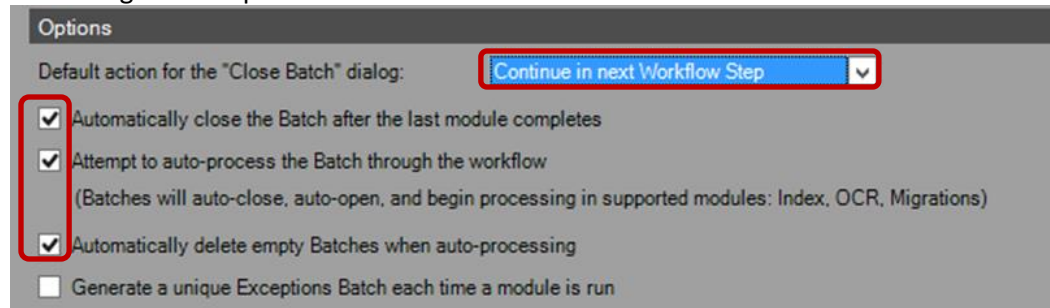


On the Quality Assurance – Indexing tab, check the 5 checkboxes outlined in the below screenshot and choose **Smart Zone and child zones** from the dropdown. This will zoom into each line item row for easier viewing in Quality Assurance.



Click **Save**

Next, in the Workflow options (at the bottom of the tab), check the top 3 checkboxes and change the dropdown to match below.



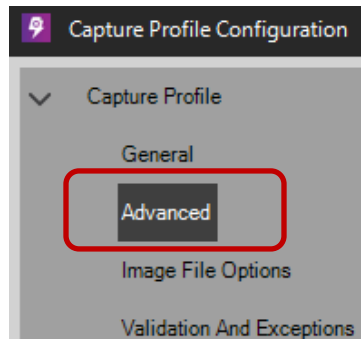
This will automate the workflow, so that the Capture Profile will process the documents without requiring user interaction after the Capture/Import module.

## Suppress Create Batch Screen

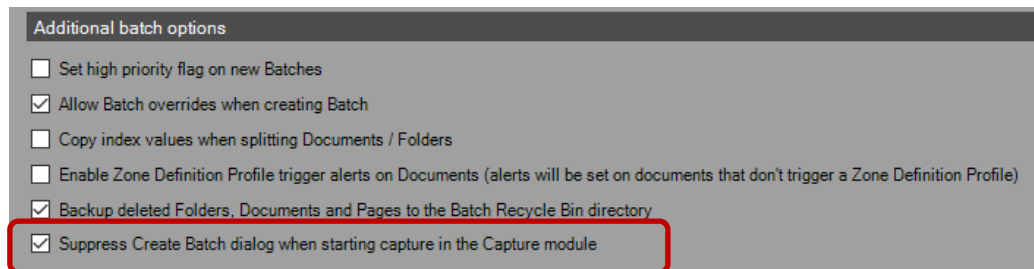
When running a batch through PSICapture the Create Batch screen is displayed by default. We will not have a need to change any settings on that screen in this profile, so we are going to suppress that screen from being displayed. On the left-hand Navigator expand out Capture Profile and select the Advanced tab.



## TABLE EXTRACTION MODULE QUICK START GUIDE

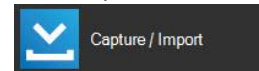


In the Additional batch options section, we want to check the 6<sup>th</sup> checkbox titled “Suppress Create Batch dialog when starting capture in the Capture module”

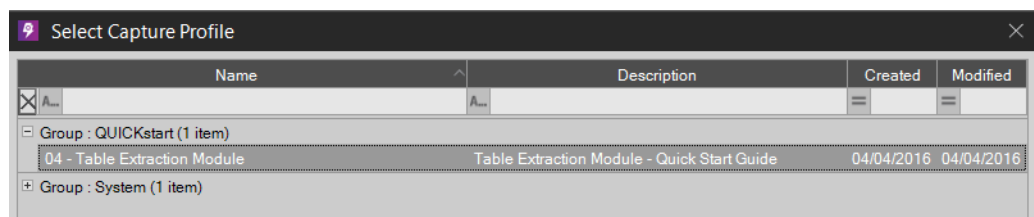


### Run the Capture Profile

You can now click **Save** in the lower right-hand corner. Click **Save** again from the Configuration screen and run the Capture Profile by clicking Capture / Import tab.



Select **04 – Table Extraction Module** Profile and click **OK**.

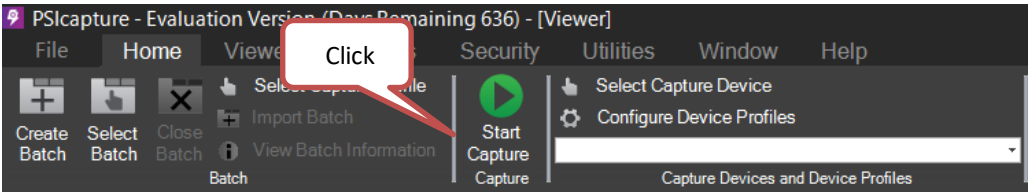


#### ☆ Note:

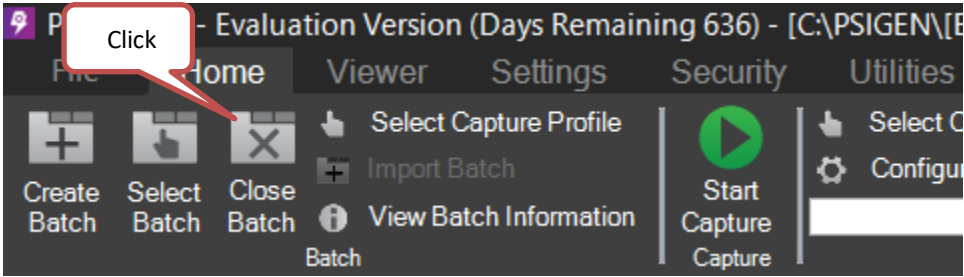
If you do not see the File Browser toward the left of the PSICapture screen, click **Select Capture Device...** icon to switch to the **Import** mode.

Using the File Browser window, navigate to where you saved the files for this guide. Select the folder on top and then select **04 – Table Extraction Module Sample.tif** from the lower window. Highlight the files and select the green **Start Capture** button or Control+S the Create Batch window to begin importing the documents into PSICapture.

TABLE EXTRACTION MODULE  
QUICK START GUIDE



When the file has finished importing, you will click the **Close Batch** button.



Ensure the selection for **Close Batch and Continue in next Workflow step (Classification)** is selected. Click **OK**.

The Classification module will attempt to auto-index the table and will then pass the batch directly to the Quality Assurance module, where you will be able to review the extracted data.

Click through **Data View** to view the place on the page from which the data was extracted.

Quality Assurance

Tree View Data View

Document Name	Inventory No	Item Description	Purchase Price	Quantity	Location
	120001	5/16" Cap	12.66	104	R30B1
	120002	5/16" x 5/16" Swivel	6.75	25	R30B2
	120003	5/16" Flare Nut BA	2.53	100	R30B3
	120004	5/16" 90° Flare Elb	3.74	201	R30B4
	120005	5/16" Flare Tee	3.99	153	R30B5
	120006	5/16" x 1/4" Union	3.79	82	R30B6
	120007	5/16" Union	2.75	17	R30B7
	120010	5/16" Flare x 1/8"	16.51	253	R30B8
	120011	5/16" Flare x 1/4"	13.38	45	R30B9
	120012	5/16" Contractor Set	9.99	300	R31A13
cont		A - 5/16" x 5/16" Swi		300	R31A13
cont		B - Water Tight Fittin		300	R31A13
cont		C - 5/16" 90° Elbow			
cont		D - 5/16" TEE			
cont		E - 5/16" x 3/8" MIP			
cont		F - 5/16" Flare Tee			
	130008	1/4" x 1/4" IPS	5.29	1200	R31A8
	130009	1/4" x 1/4" Union	1.35	2400	R31A9
	130010	1/4" Plug BAG OF 1	1.83	2600	R31A10
	130012	1/4" x 1/8" FIIPS Ad	2.35	900	R31A12
	130013	1/4" Contractor Set	9.99	400	R31A13
cont		A - 1/4" x 1/4" Swiv		400	R31A13
cont		B - 1/4" Flare Nut		400	R31A13
cont		C - 1/4" 90° Elbow		400	R31A13
cont		D - 1/4" TEE		400	R31A13
cont		E - 1/4" x 3/8" MIP		400	R31A13
cont		F - 1/4" Flare Tee		400	R31A13

Inventory No	Item Description	Purchase Price	Quantity	Locati
120002	5/16" x 5/16" Swivel Nut	\$6.75	25	R30B2
120003	5/16" Flare Nut *** BAG OF 10***	\$2.53	100	R30B3
120004	5/16" 90° Flare Elbow	\$3.74	201	R30B4
120005	5/16" Flare Tee	\$3.99	153	R30B5
120006	5/16 x 1/4" Union	\$3.79	82	R30B6
120007	5/16" Union	\$2.75	17	R30B7
120010	5/16" Flare x 1/8" MIPS Angled Needle Valve	\$16.51	253	R30B8
120011	5/16" Flare x 1/4" MIPS Angled Needle Valve	\$13.38	45	R30B9
ISLE	31	BIN	2	
120012	5/16" Contractor Set	\$9.99	300	R31A
cont	A - 5/16" x 5/16" Swivel Nut		300	R31A

**\*Please Note:** If using an NFR-Watermarking license, the second row of Multi Line item return values may be missing when margin watermarks are present.

## CONGRATULATIONS!!

You've just configured and tested a  
Capture Profile using the Table Extraction Module.