

Eyeball Configuration

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V1.1

Overview

The predefined configuration in the eyeball-condition yaml file defines the criteria for deciding whether the system performs the eyeball step. The criteria could be extraction confidence level of a field or specific value in a field or more.

The configuration also decides which fields will appear in the Eyeball screen in the portal and how, adds the missing fields, and expedites the search using Lookup table with multiple filters. All the functionalities save time and improve system efficiency.

Template

eyeball-condition.yaml

```
kind: ruleSet
metadata:
  name: extraction/v1/documents/eyeball-condition
spec:
  nodes:
    - if: 'it["InvoiceTotal"].Confidence > 0.99'
      then:
        decision: false
    - if: 'it["VendorName"].Value != "ABC"'
      then:
        decision: true
    - if: 'it.ContainsKey("Category") && it["Category"].Value == null'
      then:
        decision: true
    - if: '1=1'
      then:
        decision: true
```

Parameter	Description
If then	The condition based on which eyeballing is decided.

For example, in the above template, if the confidence level of Invoice Total field is more than 0.99 then eyeballing step is not performed. But, if the invoice contains Category field that is empty then eyeballing is performed.

eyeball-client-configuration.yaml

```
kind: document
metadata:
  name: extraction/v1/documents/eyeball-client-configuration
spec:
  fields:
    - name: "Case Id"
```

```

name: "Invoice Name"
description: "Invoice Name"
visible: false
enable: false
defaultControlType: "TextBox"

- name: "Handwritten"
description: "HandWritten"
visible: true
enable: true
displayOrder: 11
defaultControlType: "Checkbox"

- name: "Language"
description: "Language"
visible: true
enable: true
displayOrder: 12
defaultControlType: "TextBox"

- name: "DocumentType"
description: "Document type"
visible: true
mandatory: true
displayOrder: 20
enable: true
defaultControlType: "ComboBox"
validation: >
{
  "clearPattern": "[^a-zA-Z0-9 ]+"
}
controlOptions: >
{
  "filter": "contains",
  "dataTextField": "value",
  "dataValueField": "value",
  "dataSource": [
    { "value": "Merchandize" },
    { "value": "Freight Only" },
    { "value": "Drop Shipments" }
  ]
}

- name: "Culture"
description: "Culture"
visible: ': iif(String.IsNullOrEmpty(wf.Variables["extractedCulture"]), true, false)'
mandatory: true
displayOrder: 45
enable: true
defaultControlType: "ComboBox"
controlOptions: >
{
  "windowOptions": {
    "width": "800px",
    "height": "600px",
    "title": "Culture",
    "appendTo": "#layoutContainer",
    "draggable": {
      "containment": "body"
    },
    "modal": true,
    "resizable": false,
    "actions": [
      "Close"
    ]
  }
}

```

```

    },
    "filter": "contains",
    "dataTextField": "value",
    "dataValueField": "code",
    "dataSource": {
      "transport": {
        "read": {
          "url": "/api/components/configuration/v1/cultures",
          "contentType": "application/json"
        }
      }
    },
    "pageSize": 1000,
    "serverPaging": false,
    "serverFiltering": false
  }
}

```

```

- name: "RejectReason"
  description: "Reject Reason"
  visible: true
  enable: true
  displayOrder: 300
  defaultControlType: "MultiSelect"
  controlOptions: >
  {
    "delimiterValue": ";",
    "tagMode": "single",
    "dataTextField": "value",
    "dataValueField": "value",
    "downArrow": true,
    "dataSource": [
      { "value": "Incorrect Bill To Address" },
      { "value": "OpCo Code Not Found" },
      { "value": "Partial split failure" },
      { "value": "PO - Cancelled/ Invalid/ Not Found" },
      { "value": "Invoice number missing" },
      { "value": "Currency Not Found" }
    ]
  }
}

```

```

- name: "InvoiceId"
  description: "Invoice Number"
  displayOrder: 40
  defaultControlType: "TextBox"
  mandatory: true
  enrichOtherFields: true
  validation: >
  {
    "clearPattern": "[^a-zA-Z0-9 ]+"
  }
  attributes: >
  {
    "maxLength": 20
  }
}

```

```

- name: "PORefNumber"
  description: "PO Ref_Num"
  visible: true
  mandatory: true
  enable: true
  displayOrder: 70
  defaultControlType: "MultiColumnComboBox"
  controlOptions: >
  {

```

```

{
  "dataTextField": "Id",
  "dataValueField": "Id",
  "autoBind": false,
  "columns": [
    { "field": "PONumber", "title": "PO Number", "width": 200 },
    { "field": "Id", "title": "Id", "width": 200 }
  ],
  "filter": "contains",
  "virtual": {
    "itemHeight": 33
  },
  "height": 330,
  "dataSource": {
    "transport": {
      "read": {
        "url": "/api/components/data-model/v1/query/vwPO",
        "contentType": "application/json"
      }
    },
    "pageSize": 40,
    "serverPaging": true,
    "serverFiltering": true
  }
}

```

```

- name: "OpcoCode"
  description: "Opco Code"
  visible: true
  mandatory: true
  enable: true
  displayOrder: 80
  defaultControlType: "PopupTable"
  controlOptions: >
  {
    "dataValueField": "OPCOCode",
    "dataTextField": "OPCOCode",
    "windowOptions": {
      "width": "800px",
      "height": "600px",
      "title": "Opco Code",
      "appendTo": "#layoutContainer",
      "draggable": {
        "containment": "body"
      },
      "modal": true,
      "resizable": false,
      "actions": [
        "Close"
      ]
    },
    "gridOptions": {
      "dataSource": {
        "transport": {
          "read": {
            "url": "/api/components/data-model/v1/query/vwOPCOS",
            "contentType": "application/json"
          }
        },
        "schema": {
          "data": "data",
          "model": {
            "fields": {
              "OPCOCode": { "type": "string" },

```

```

        "OPCOName": { "type": "string" },
        "OPCOAddress": { "type": "string" },
        "OPCOZip": { "type": "string" }
    }
}
},
"filterable": {
    "defaultFilterColumn": "OPCOCode",
    "extra": false,
    "messages": {
        "info": ""
    },
    "operators": {
        "string": {
            "contains": "Contains"
        },
        "number": {
            "equal": "Equal"
        }
    }
},
"columns": [
    { "field": "OPCOCode", "title": "OPCOCode" },
    { "field": "OPCOName", "title": "OPCOName" },
    { "field": "OPCOAddress", "title": "OPCOAddress" },
    { "field": "OPCOZip", "title": "OPCO Zip" }
],
"result": {
    "dataValueField": "OPCOCode",
    "dataTextField": "OPCOCode"
},
"height": 410,
"scrollable": true,
"selectable": true
}
}

```

- name: "Category"
 - description: "Category"
 - visible: true
 - enable: false
 - displayOrder: 310
 - defaultControlType: "TextBox"
- name: "KeyPhrase"
 - description: "Key Phrase"
 - visible: true
 - displayOrder: 320
 - defaultControlType: "TextBox"
 - determinesCategory: true
 - enrichOtherFields: true
- name: "PaymentDetail"
 - description: "Payment Detail"
 - typeName: "PaymentDetail"
 - defaultControlType: "Array"
 - fields:
 - name: "IBAN"
 - description: "IBAN Number"
 - defaultControlType: "TextBox"
- name: "SWIFT"
 - description: "SWIFT"

defaultControlType: "TextBox"

- name: "BankAccountNumber"
description: "Bank Account Number"
defaultControlType: "TextBox"

Parameter	Description
Name	Determines the name of the field in JSON.
Description	Adds a brief description of the field.
Visible	Determines if the field is displayed in the UI.
Mandatory	Determines whether the field value is mandatory.
Enable	Determines whether the field is enabled.
DisplayOrder	Determines the order in the UI where the field is displayed.
DefaultControlType	Determines the type of the field. • Array: For grid type fields like line items. • TextBox: For plain text fields. • NumericTextBox: For text fields with only numeric data. • ComboBox: For combination of text box and drop-down list type of fields. • MultiColumnComboBox: For combo box type fields with multiple columns. • MultiSelect: For combo box type fields that allow simultaneous multiple selections. • DatePicker: For date type fields. • PopupTable: For lookup control with multiple filters type fields.
ControlOptions	Determines parameters to define values for multiple selection type of fields like combo box, popup table, multiselect, and multicolumn combo box. The control option parameters for different type of fields may be different.
Enrich Other Fields	Determines whether a field will enrich other fields. If true, the parameters from a field are applicable for other fields.

For example, for an Invoice extraction, one of the fields could be *Document Type* and its parameters could be the following:

name: "DocumentType"	The name of the field in the JSON is DocumentType.
description: "DocumentType"	A description of the field.

<code>mandatory: true</code>	It is mandatory to have a value in the field.
<code>enable: true</code>	The field is enabled.
<code>visible: true</code>	The field is visible in the Eyeball screen in the portal.
<code>displayOrder: 20</code>	The position of this field is 20 in order in the Eyeball screen in the portal.
<code>controlType: "ComboBox"</code>	The field is a combo box.
<code>"filter": "contains",</code>	The field has filters.
<code>"dataValueField": "value"</code>	The data value of the field.
<code>"dataTextField": "value"</code>	The data text of the field.
<code>"dataSource":[{ "value": "Merchandize" }, { "value": "Freight Only" }, { "value": "Drop Shipments" }]</code>	The values for selection in the combo box.

Control Option parameters

Parameter	Description
WindowOptions	Determines the window model, resizable, action of the field for combo box and popup table type fields.
GridOptions	Determines the display data, formatting of the field for popup table type field.
Schema	Determines the data and structure of the popup table type field.
Filterable	Determines which column(s) in the popup table type field will be filterable.
Operators	Determines the use for filtering the column of the popup table type field.
Columns	Determines the column in the popup table type field.
Results	Determines the result of the dataValue and dataText field for the popup table type field.
Height	Determines the height of the popup table type field.
Scrollable	Determines if the popup table type field is scrollable.
Selectable	Determines if the value of the popup table type field is selectable.

Add business columns to Eyeball task grids

1. Duplicate the *Update Unsigned Solution Variables* workflow.
2. Add a new application variable:
 - Name: UpdateVariableWorkflowName
 - Value: The name of the workflow space created in Step 1.
3. For the OOTB Global variables, there are two default columns, *Vendor Name* and *Invoice Amount*.
4. To add additional columns to the grid:
 - a. Select the IDE Eyeball solution.
 - b. Click on *ManageUnsignedSolutionVariables*.
 - c. Add the required variable(s).
 - d. Go to the workflow duplicated in Step 1.
 - e. Edit the *Update Variables* activity to add the required variable(s) to the list.

IMPORTANT

Ensure that the column order in the line items table is identical in both *extraction-model.yaml* and *eyeball-client-configuration.yaml*.

V1.0

Overview

The predefined configuration in the *eyeball-condition.yaml* file defines the criteria for deciding whether the system performs the eyeball step. The criteria could be extraction confidence level of a field or specific value in a field or more.

The configuration in the *eyeball-client-configuration.yaml* file decides which and how the fields will appear in the eyeball screen in the portal.

Template

eyeball-condition.yaml

```
kind: ruleSet
metadata:
  name: extraction/v1/documents/eyeballing-decision
spec:
  nodes:
    - if: 'it["InvoiceTotal"].Confidence > 0.99'
      then:
        decision: false
    - if: 'it["VendorName"].Value != "ABC"'
      then:
        decision: true
    - if: '1=1'
      then:
        decision: true
```

Parameter	Description
If then	The condition based on which eyeballing is decided.

For example, in the above template, if the confidence level of Invoice Total field is more than 0.99 then eyeballing step

is not performed.

eyeball-client-configuration.yaml

```
kind: document
metadata:
  name: extraction/v1/documents/eyeball-client-configuration
spec:
  fields:
    - name: "Case_Id"
      description: "Invoice Name"
      visible: false
      enable: false
      defaultControlType: "TextBox"

    - name: "DocumentType"
      description: "Document type"
      visible: true
      mandatory: true
      displayOrder: 20
      enable: true
      defaultControlType: "ComboBox"
      validation: >
        {
          "clearPattern": "[^a-zA-Z0-9 ]+"
        }
      controlOptions: >
        {
          "filter": "contains",
          "dataTextField": "value",
          "dataValueField": "value",
          "dataSource": [
            { "value": "Merchandize" },
            { "value": "Freight Only" },
            { "value": "Drop Shipments" }
          ]
        }

    - name: "VendorNumber"
      description: "Vendor Number"
      visible: true
      mandatory: true
      enable: true
      displayOrder: 90
      defaultControlType: "MultiColumnComboBox"
      controlOptions: >
        {
          "dataTextField": "VendorNumber",
          "dataValueField": "VendorNumber",
          "columns": [
            { "field": "VendorName", "title": "Vendor Name", "width": 200 },
            { "field": "VendorNumber", "title": "Vendor Number", "width": 200 },
            { "field": "VendorType", "title": "Vendor Type", "width": 200 }
          ],
          "filter": "contains",
          "virtual": {
            "itemHeight": 33
          },
          "height": 330,
          "dataSource": {
            "transport": {
              "read": {
                "url": "/api/components/data-model/v1/query/VendorsByNumber",
                "contentType": "application/json"
              }
            }
          }
        }
```

```

        "contentType": "application/json",
        },
        "pageSize": 40,
        "serverPaging": true,
        "serverFiltering": true
    }
}

```

```

- name: "RejectReason"
  description: "Reject Reason"
  visible: true
  displayOrder: 300
  defaultControlType: "ComboBox"
  controlOptions: >
  {
    "filter": "contains",
    "dataTextField": "value",
    "dataValueField": "value",
    "dataSource":[
      { "value": "Currency mismatch between invoice and PO/NPO" },
      { "value": "Duplicate Remit To Address" },
      { "value": "Full split failure" },
      { "value": "Incorrect Bill To Address" },
      { "value": "INVOICE RESCAN REQUIRED" },
      { "value": "Multiple invoices in single pdf" },
      { "value": "OpCo Code Not Found" },
      { "value": "Partial split failure" },
      { "value": "PO - Cancelled/ Invalid/ Not Found" },
      { "value": "Required information missing" },
      { "value": "Vendor Creation Required" },
      { "value": "Vendor does Not Match Invoice" },
      { "value": "Vendor Modification Required" }
    ]
  }
}

```

```

- name: "InvoiceLineItem"
  description: "Line Items"
  typeName: "InvoiceLineItem"
  defaultControlType: "Array"
  fields:
    - name: "LineItemNumber"
      description: "LineItemNumber"
      visible: false
      defaultControlType: "TextBox"

    - name: "Description"
      description: "Description"
      defaultControlType: "TextBox"
      width: "45%"

    - name: "CatchWeight"
      description: "CatchWeight"
      defaultControlType: "TextBox"

```

Parameter	Description
Name	Determines the name of the field in JSON.
Description	Adds a brief description of the field.

Parameter	Description
Visible	Determines if the field is displayed in the UI.
Mandatory	Determines whether the field value is mandatory.
Enable	Determines whether the field is enabled.
displayOrder	Determines the order in the UI where the field is displayed.
controlType	Determines the type of the field like Textbox or Combo box.
controlOptions	Determines filters on the field.

For example, for an Invoice extraction, one of the fields could be Document type and its parameters could be the following:

name: "DocumentType"	The name of the field in the JSON is DocumentType.
description: "DocumentType"	A small description of the field.
mandatory: true	It is mandatory to have a value of the field.
enable: true	The field is enabled.
visible: true	This field is visible in the UI.
displayOrder: 20	In the UI the place of this field is 20 in order.
controlType: "ComboBox"	This field is a combo box.
"filter": "contains",	This field contains filters.
{ "value": "Merchandize"}, { "value": "Freight Only"}, { "value": "Drop Shipments" }	Values for the combo box.

Add business columns to Eyeball task grids

1. Duplicate the *Update Unsigned Solution Variables* workflow.
2. Add a new application variable:
 - o Name: UpdateVariableWorkflowName
 - o Value: The name of the workflow space created in Step 1.
3. For the OOTB Global variables, there are two default columns, *Vendor Name* and *Invoice Amount*.
4. To add additional columns to the grid:
 - a. Select the IDE Eyeball solution.
 - b. Click on *ManageUnsignedSolutionVariables*.
 - c. Add the required variable(s).
 - d. Go to the workflow duplicated in Step 1.
 - e. Edit the *Update Variables* activity to add the required variable(s) to the list.

1.