

OCR PAC Quick Start Guide

This is a brief overview of how to set-up and use OCR PAC. For more detailed information, please refer to the OCR PAC User Guide.

- 1) OCR PAC uses a unique identifier (***document identifier***) to decide who the document belongs to. Eg Business numbers and phone numbers are unique. The Document Identifiers tab on the Options screen lists the labels that OCR PAC will look for – eg ABN, Phone, Telephone etc. You can edit these as required. When a document is loaded into the program, OCR PAC will search for these keywords to try to determine who the document is from.
- 2) OCR PAC requires the Vendor Number, Invoice date, Document Number, Tax and Amount to be entered. Additionally you can specify that OCR PAC extracts other information such as Invoice Description, PO Number, optional fields etc. This is setup on the Additional Field tab on the Options screen.
- 3) OCR PAC can process tif, jpeg, pdf (etc, etc) which you may receive via email or scanned in from paper documents. Usually you would scan the documents or save them into the OCR PAC Processing directory as specified in the Options screen. Once OCR PAC processes a document it will move it into a sub-directory called “Processed”.
- 4) To begin processing, open the Data Capture screen. Select the batch to save the document into (or press the arrow button to create a new batch).
- 5) Choose Get Document and select the document file to process.
- 6) If this is the ***first time*** OCR PAC has seen this invoice it may be able to automatically determine who the document is for, or it may prompt you to select which vendor this document belongs to. Once the Vendor has been decided the document identifier data (phone number or business number etc) will be saved back into the Vendor Master file field (eg Phone Number or Tax Reg) as specified in the Options screen document identifier tab. You will then be asked to define the areas on the document where the data is to be found (i.e. create a ***template***).
- 7) To define a field on the document, you need to specify where the ***“business word”*** is that lies next to, or near, the data. For example, to specify the **document number**, you could draw a box around the words Invoice Number on the document. A menu of the possible ACCPAC fields will then appear. If you choose Document Number then OCR PAC will place a box to the right of the business word. You can resize and position

this box around the actual invoice number data as appropriate. Once satisfied, press the tick and the data will be extracted and appear in the relevant field in the right hand side.

- 8) Repeat point 7 for each piece of data, as appropriate. You can also type into any of the boxes down the right-hand side.
- 9) Once completed, choose Add to Batch. The data will be stored in the AP Batch. If elmagePac is installed and linked to OCRPAC (configured in the Options form), then the document file will also be linked into elmagePac and copied to the server. The document file will be moved into the "Processed" sub-directory.
- 10) You will be prompted to choose another file and start the process again.
- 11) When a document is opened, and a template has already been created for this vendor, the data will automatically be extracted by OCRPAC and the fields on the right hand side will be populated. You can edit these fields, or change any of the positions of the boxes on the document image, as appropriate. When all is ok, just choose Add to Batch.