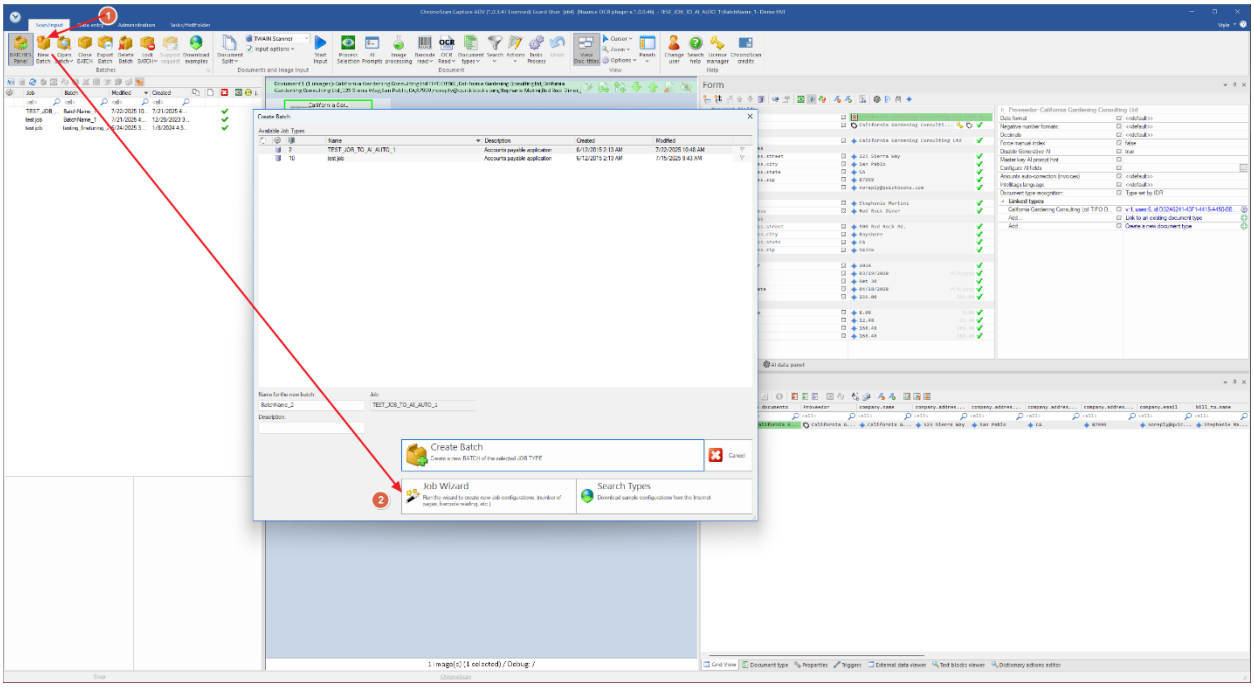
Quick Job Configuration with ChronoScan AI

@V1.0.3.47

We demonstrate a quick way to automatically configure a Job in ChronoScan using AI. In this example, we use Gemini AI, but the process also works with ChatGPT.

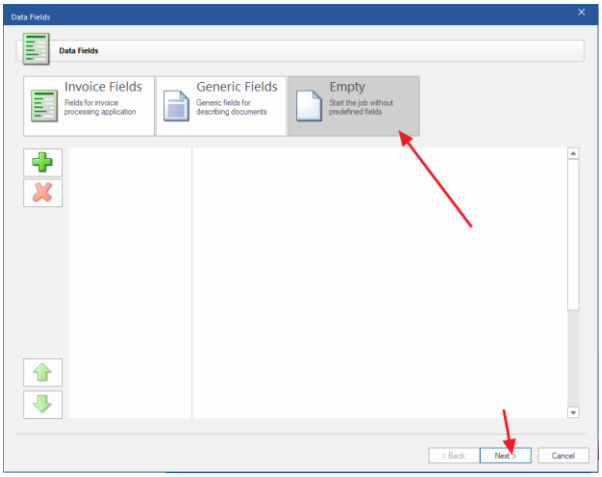
1. **Start by creating a new Job from scratch and select the blank job template.**



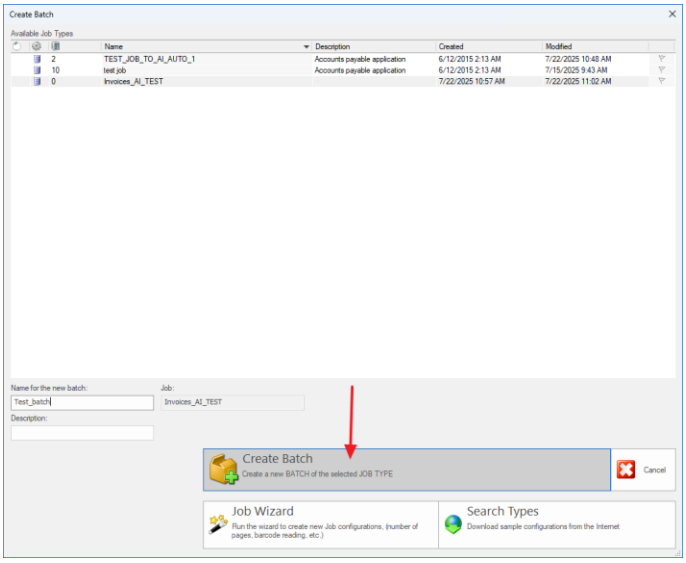
1.1 Assign a name to your Job.

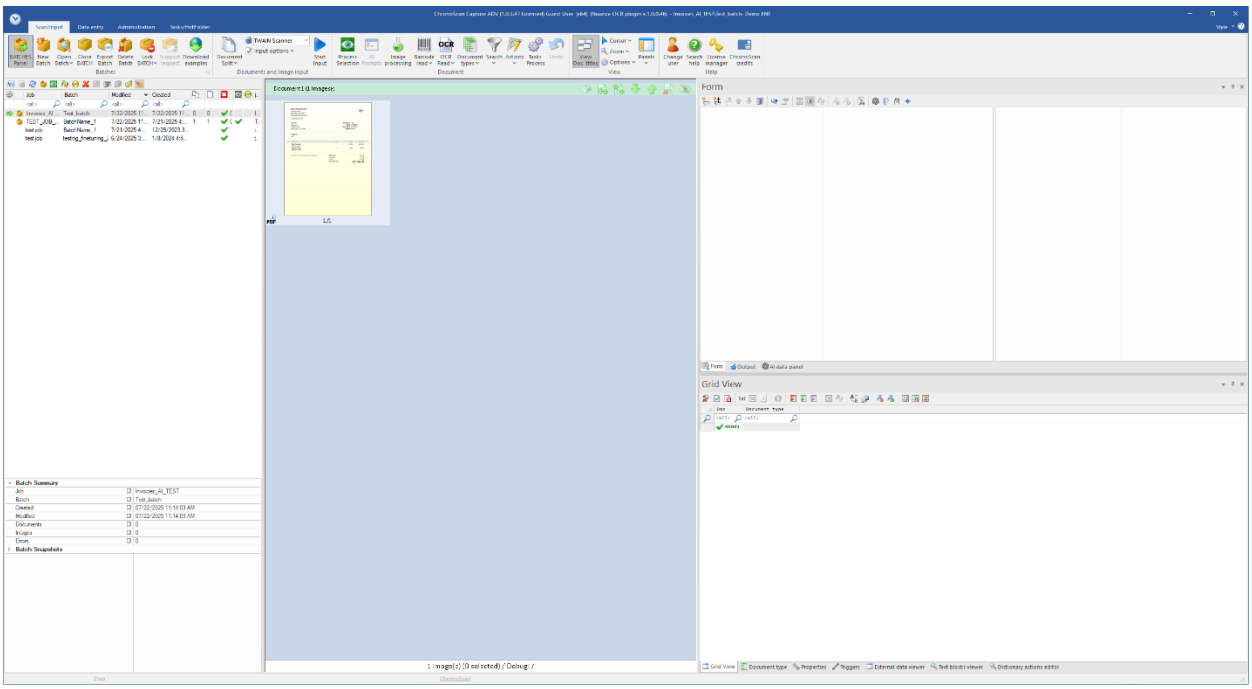
1.2 Select the Job type, input format, and output format as needed.

1.3 Choose the "Blank Job" option.



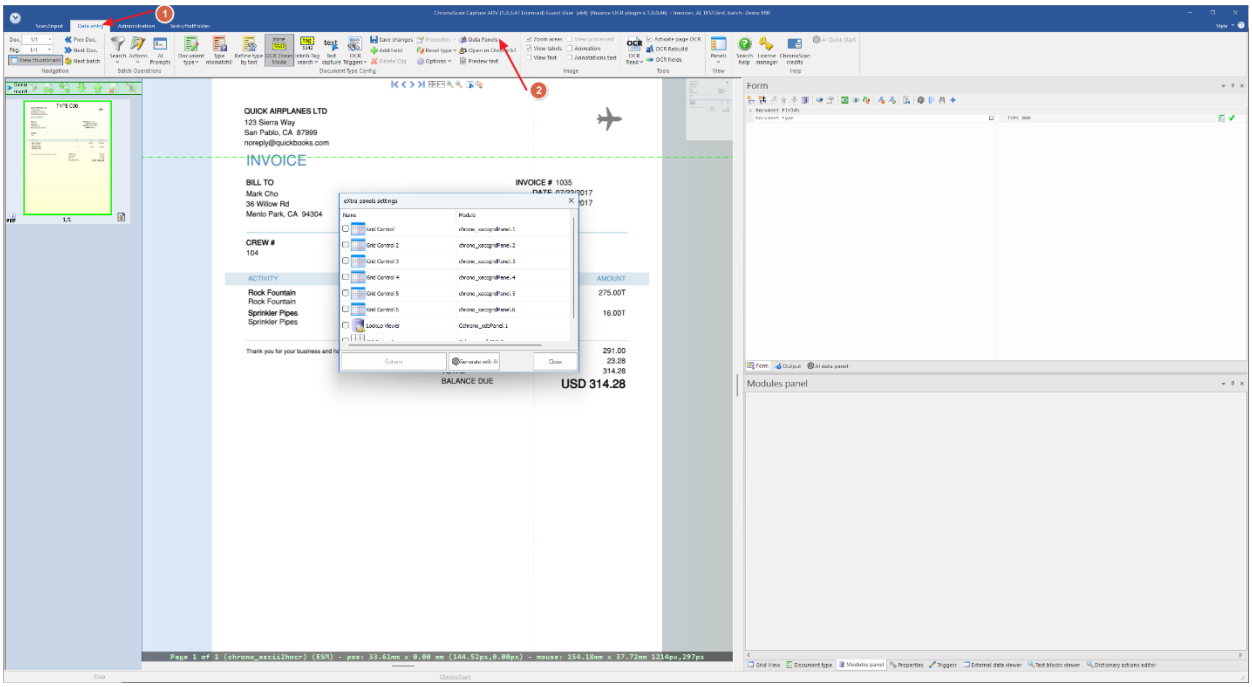
1.4 With the new empty Job created, create a batch using the document template you want to use to generate the Job fields and/or grid(s).



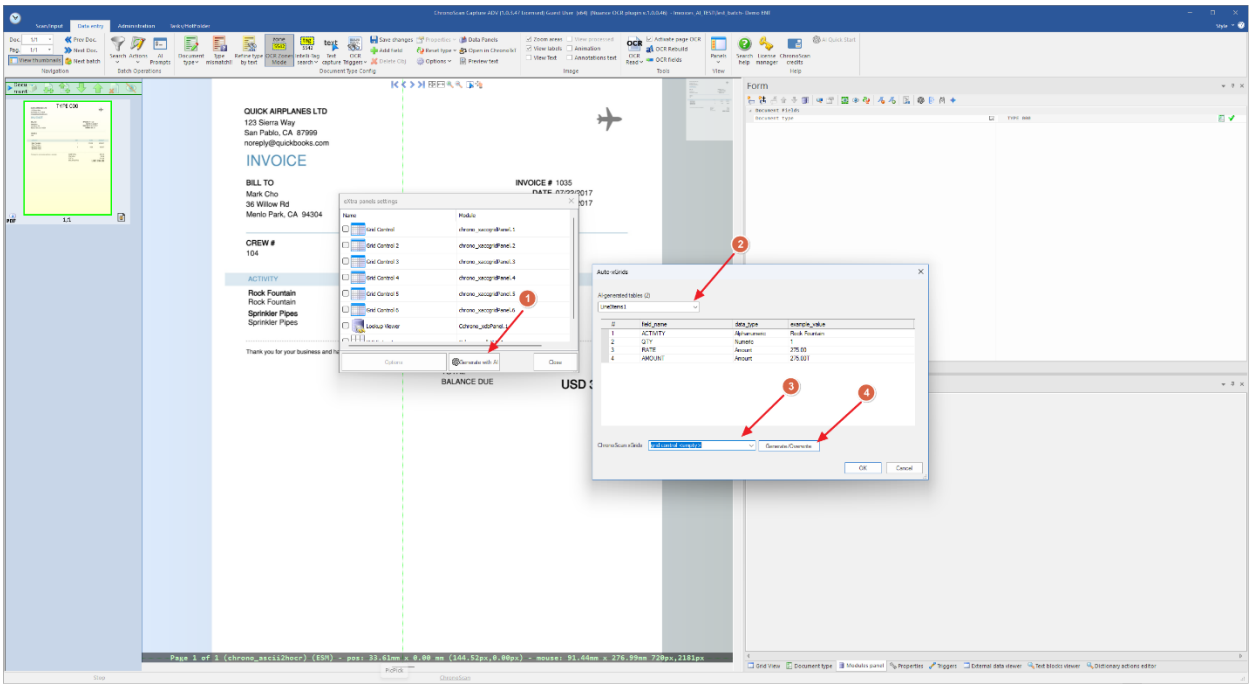


2. (Optional) Enable or create line-item extraction grids if needed.

If your job requires line-item extraction, you need to activate or create the line-item panel first. To do this, enter “data entry mode” by double-clicking the document image, then select the “Data Panels” option.



Since we are configuring the job using AI, we will generate the xGrid with AI as well. Click the “Generate with AI” button, select the desired model, and ChronoScan will automatically create the line-item table structure for you based on the document data.

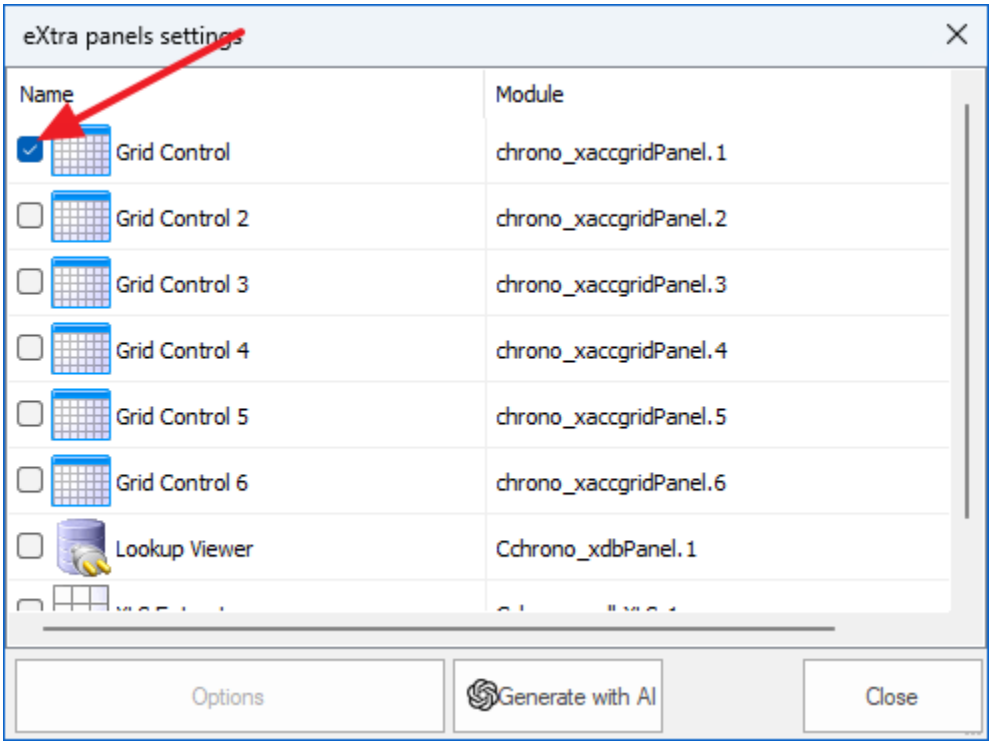


If any grids are found, they will be listed in the first drop-down menu. Select the target ChronoScan xGrid and click “Generate/Overwrite” to create the displayed table.

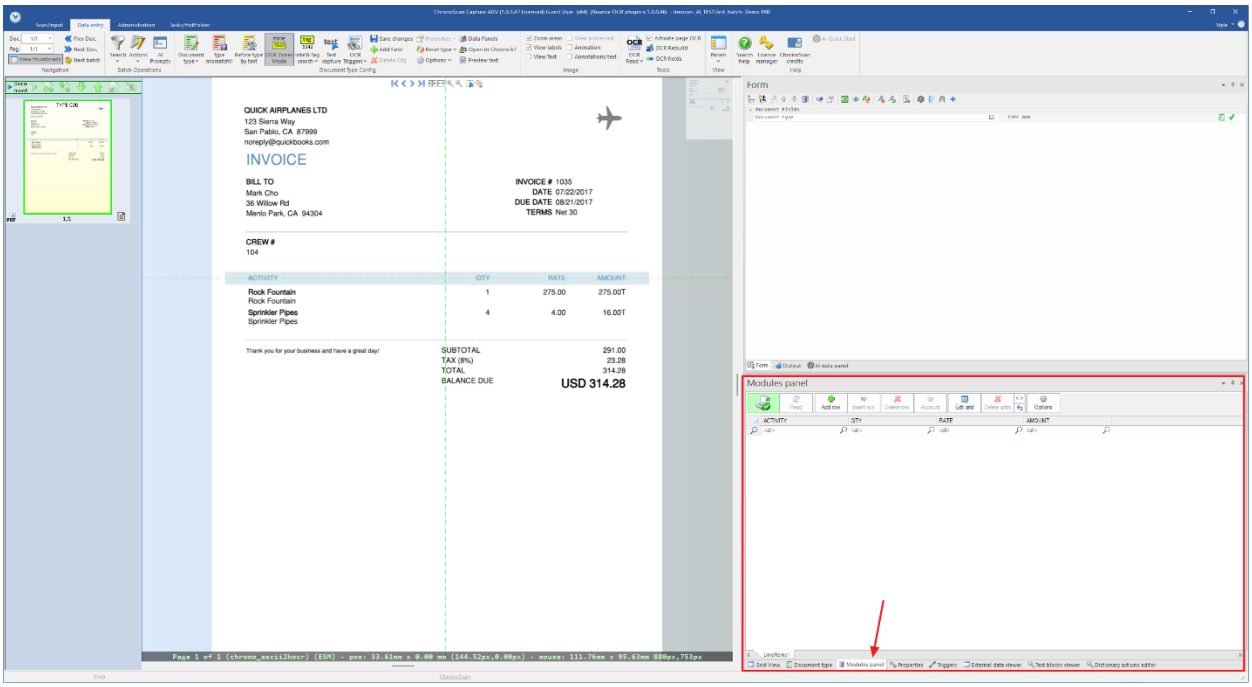
You can fine-tune the xGrid configuration at any time by clicking the "Configure" button.

For more info about generating xgrids with AI visit this link.

Once generated, close the window, and remember to activate the desired/ generated grids.



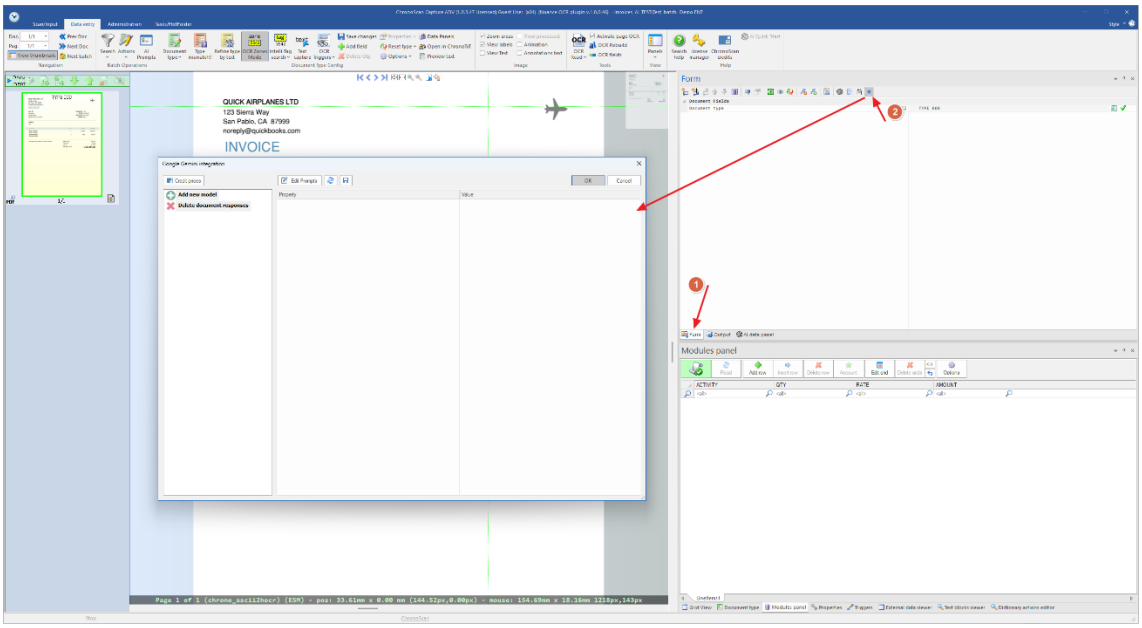
After closing this window, you will be able to view the table in the “Modules Panel”.



At this point, we have an empty Job with a line-item extraction table configured. Next, we will create the Job fields and set up automatic extraction using an AI configuration—in this case, Gemini AI.

3. Create the AI model to generate the Job fields and its extraction.

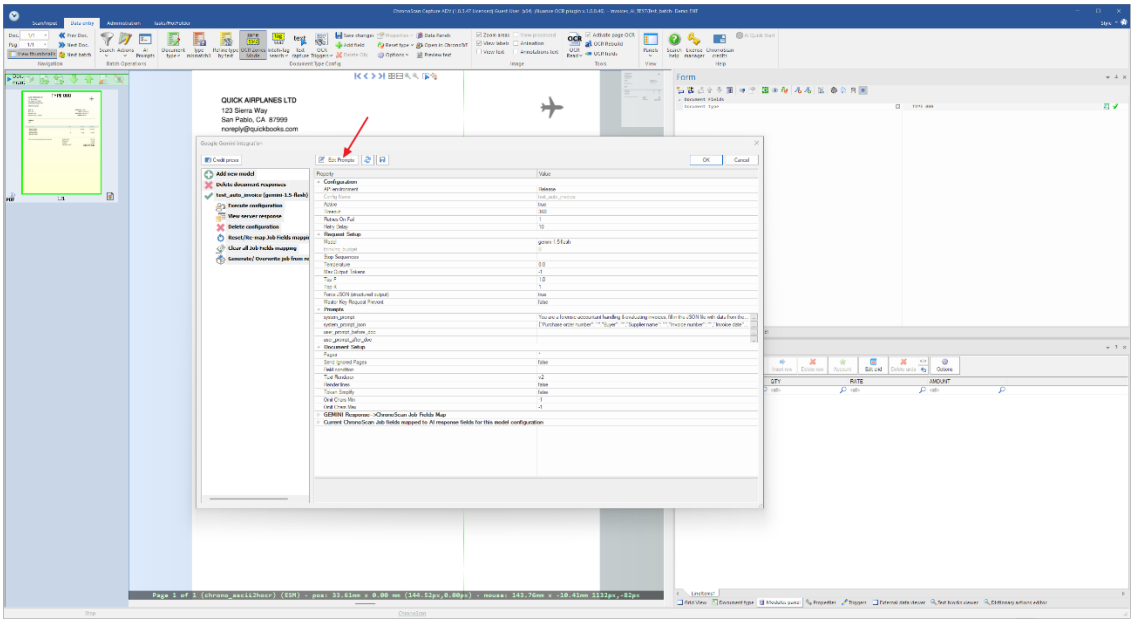
Open the Gemini configuration window by clicking the Gemini icon in the form panel.



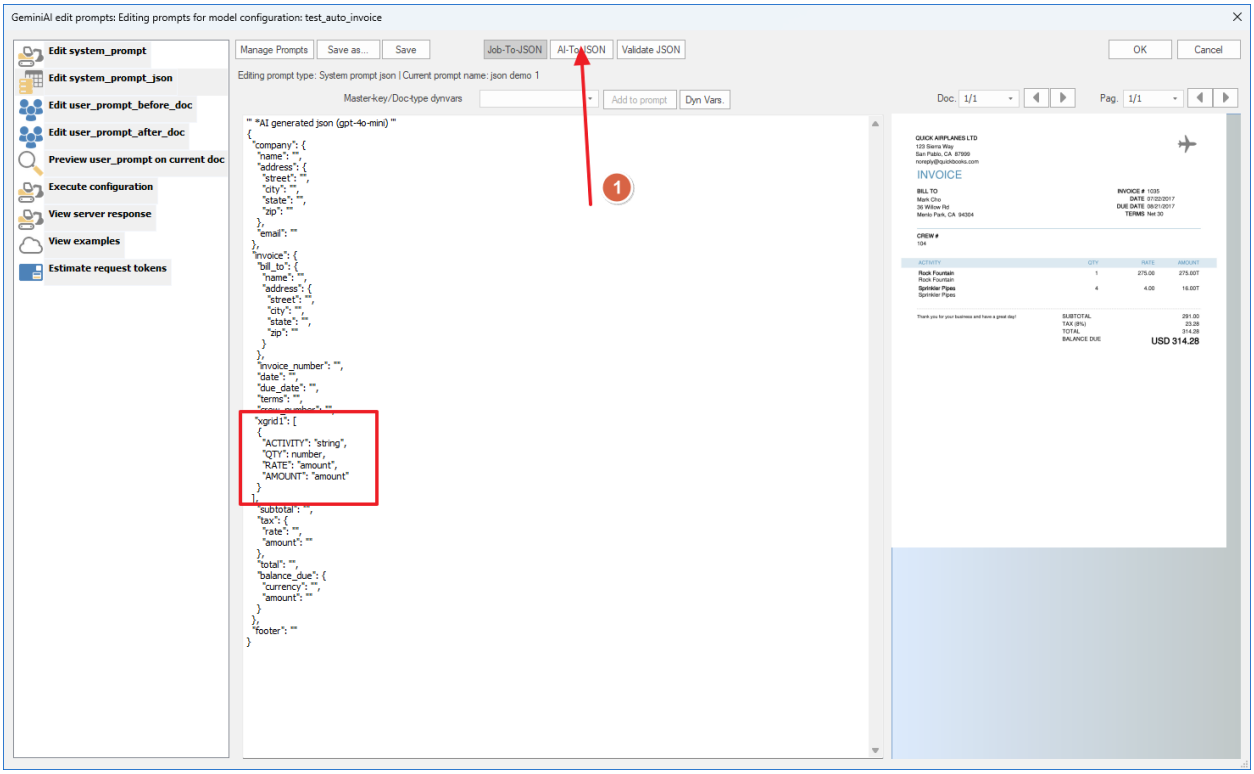
Click on “Add a new model” and give it a name.

Once created, and since this is a straightforward example, we will leave most settings at their defaults. Because we are generating a job with an AI model, we will focus only on the JSON response we want the AI to generate and extract from the document.

Now, click “Edit Prompts” and select the “**edit_system_prompt_json**” option from the left menu. Since we are creating the job with AI, click the “AI-to-JSON” button.



The AI will analyze the document and generate a structured JSON representation. At this point, you can make changes if needed—just make sure the JSON remains well-structured and simple. For example, in this case, the line-items array is returned with the name “activities.” We recommend renaming this array to match the internal name of your previously created xGrid (e.g., “xgrid1”) and the same grid columns names. (you can click in job-to-json) and copy the line items structure into your json if necesary. This will make it easier to identify and auto-map the line items in the next step.

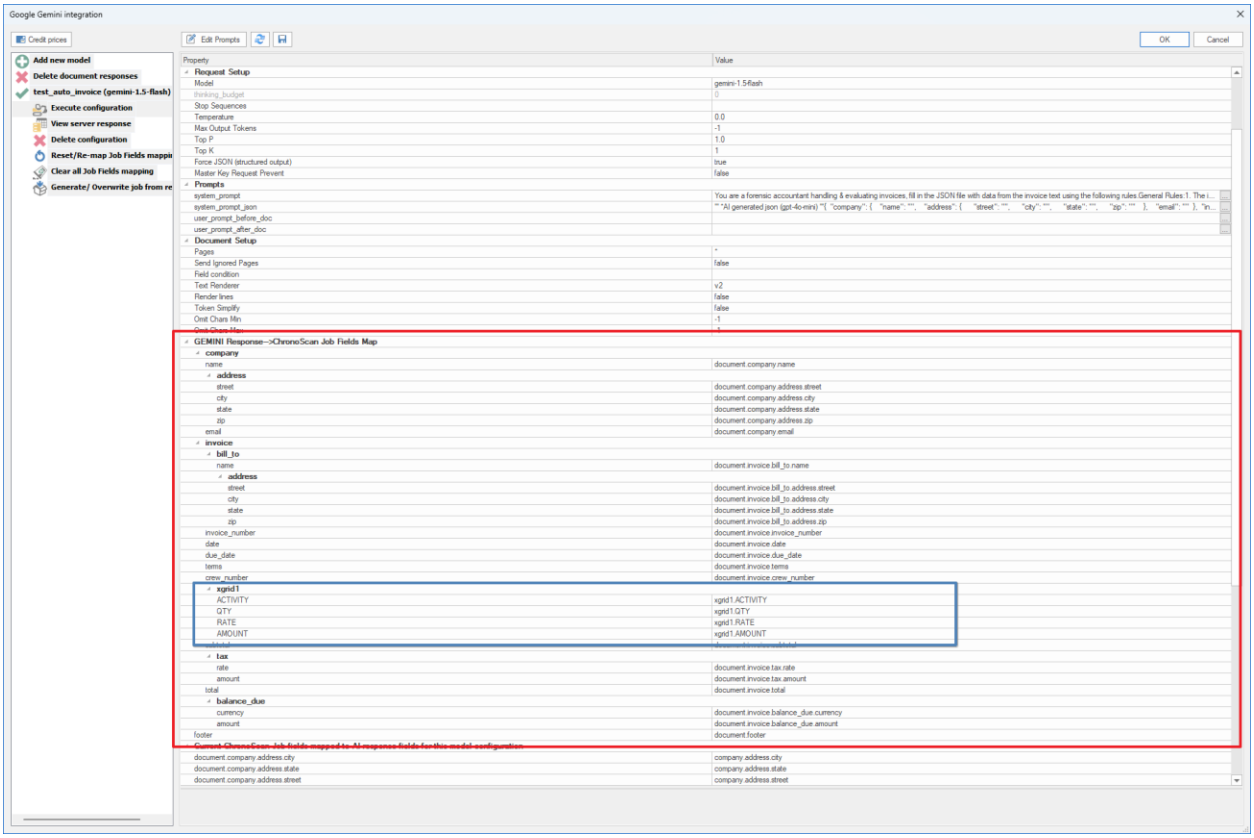


Now, save the new JSON prompt and return to the previous window.

Now, click “Execute Configuration” and wait for the AI response. Note that the AI response will be automatically mapped to the JSON configuration if the response contains the exact same fields as defined in the configuration.

It’s important to carefully review the mapped fields to ensure they meet our requirements. For instance, in this case, the line-items were also mapped automatically since we provided the exact structure in the JSON prompt, matching ChronoScan’s configuration.

Alternatively, you don’t have to provide the exact structure up front—instead, you can manually map the fields to the desired xgrid or field names. This approach allows for greater flexibility if the incoming JSON doesn’t perfectly match ChronoScan’s configured structure.



4. Generate the Job from the AI response.

Once the mappings are configured, you can proceed to generate the Job using the response data.

Click on “Generate/Overwrite Job from response”; this will automatically populate the Job fields based on the structure of the response, ensuring that all mapped fields are included as defined.

Note that this action allows you to overwrite previously configured Jobs. Because this can result in loss of existing configurations, a confirmation prompt will be presented to the user before any changes are applied.

After confirmation, the system will generate the Job fields according to the response structure. These fields will then be immediately visible within the form, allowing you to review or further configure them as needed.

5. Testing the Newly Configured Job Extraction

- Save your changes in the Gemini window, then close it.
- To test the extraction, click the green processing button.
- Confirm that the *GeminiAi processing* option is selected.
- Click *OK*. The document will be processed using the new job configuration.

The Job extraction process is now fully automated, thanks to a Job configuration created with the assistance of AI.