
Document Insider - Packaging User Manual

User Manual

DEEPSITE LIMITED

2025-10-21



Contents

1	General Information	3
1.1	Purposes	3
1.2	System Overview	3
2	Getting Started	3
2.1	Raising IFF ServiceNow Tickets for New Users Onboarding	3
2.2	Logging on	8
2.3	Homepage	10
2.3.1	Quick Search Area	13
2.4	Spec Page	13
2.4.1	Display and download the original packaging documents	13
2.4.2	Extracted Result Display	14
2.5	Main Functions for Spec Page	16
2.5.1	Revise Extracted Results	16
2.5.2	Change Extraction Status	18
2.5.3	Issue Report	21
2.6	Case Page (Harmonized Result)	25
2.6.1	Harmonized Result Display	25
2.6.2	Filter Panel	25
2.6.3	Case Management/Manage Harmonization Results	25
2.6.4	Export Harmonized Result	27
3	Manually Uploading Packaging Document	30
3.1	Uploading via Insighter Portal	30
3.2	Check Uploaded Files Status	32
4	Technical Support	34

1 General Information

1.1 Purposes

This User Manual serves as a comprehensive guide to the DEEPSITE Document Insider® system. It aims to familiarize users with the system's interface and management functions, enabling them to log in, navigate, and effectively utilize the system. Additionally, this manual offers solutions to common issues that may arise during system usage, and provides instructions on accessing resources and obtaining assistance.

1.2 System Overview

Document Insider® is a cutting-edge digitizing solution powered by Advanced Content Intelligence. It offers a seamless service that allows users to effortlessly read documents, digitize images and tables, extract desired data, and perform various content-related tasks. Furthermore, Document Insider® facilitates auto validation and ontology, enabling users to compare extracted data from documents with their enterprise SAP database. The system also supports user feedback and continuous learning, leveraging a cloud-based portal to enhance precision and accuracy.

2 Getting Started

2.1 Raising IFF ServiceNow Tickets for New Users Onboarding

This section aims to provide step-by-step instructions to ensure a smooth onboarding process for new users accessing Document Insider via their IFF ID. By following these steps, you can easily request access to various systems and resources required for your role.

Step 1: Accessing IFF ServiceNow Ticket Raising Page

1. Open your web browser and navigate to the IFF IT Service portal and click the "Software/Access Request" Button.

Download and Installing Tableau on your machine (V1.0)

S.A.M.
SERVICE ALWAYS MATTERS

IT SERVICE CATALOG

Hardware Request **Software/Access Request** IFF Site Services Ticket Escalations

Incidents

All > Caller is Roger Li Zhang > Active = true

Number	Short description
INC1115366	Offlow stock number in offlow is incorrect

Rows 1 - 1 of 1

Requested Items

All > Request Requested for is Roger Li Zhang .or. Request Opened by is Roger Li Zhang > Active = true

Number	Short description	Created
RITM0348152		05-16-2022 13:40:44

Rows 1 - 1 of 1

Approvals

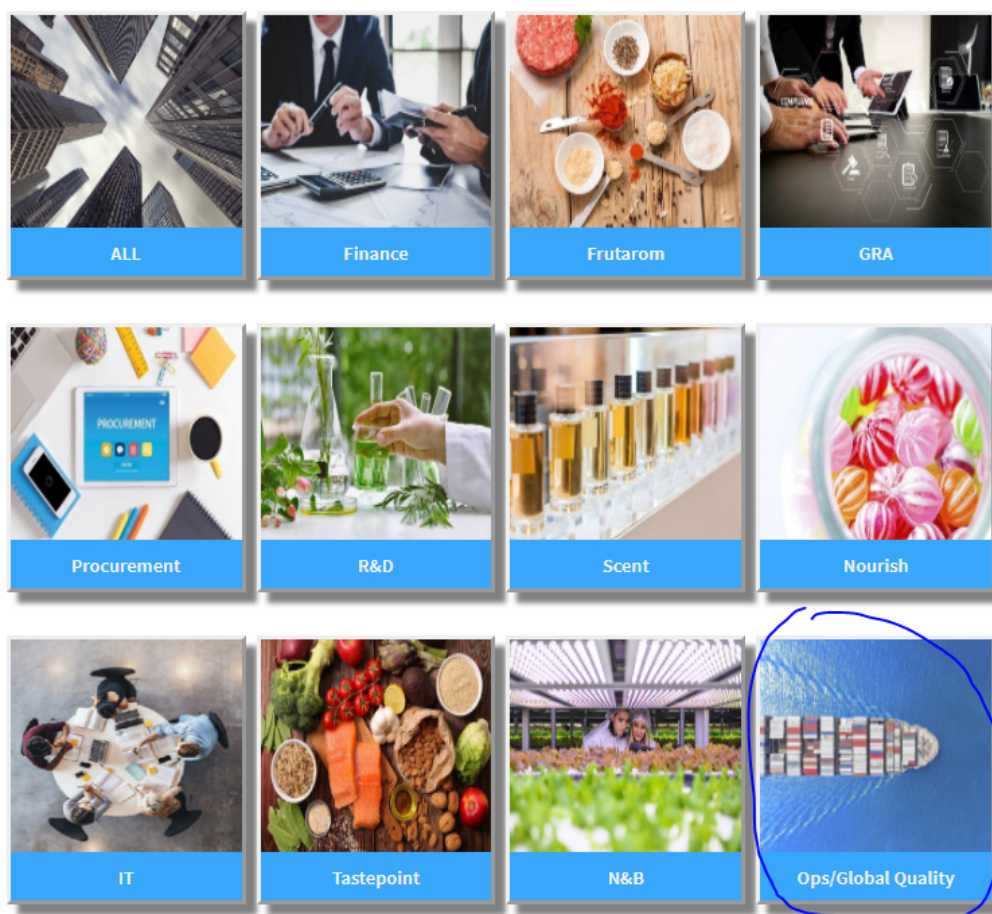
All > Approver is Roger Li Zhang > State = Requested

No records in Approval using that filter

Announcements

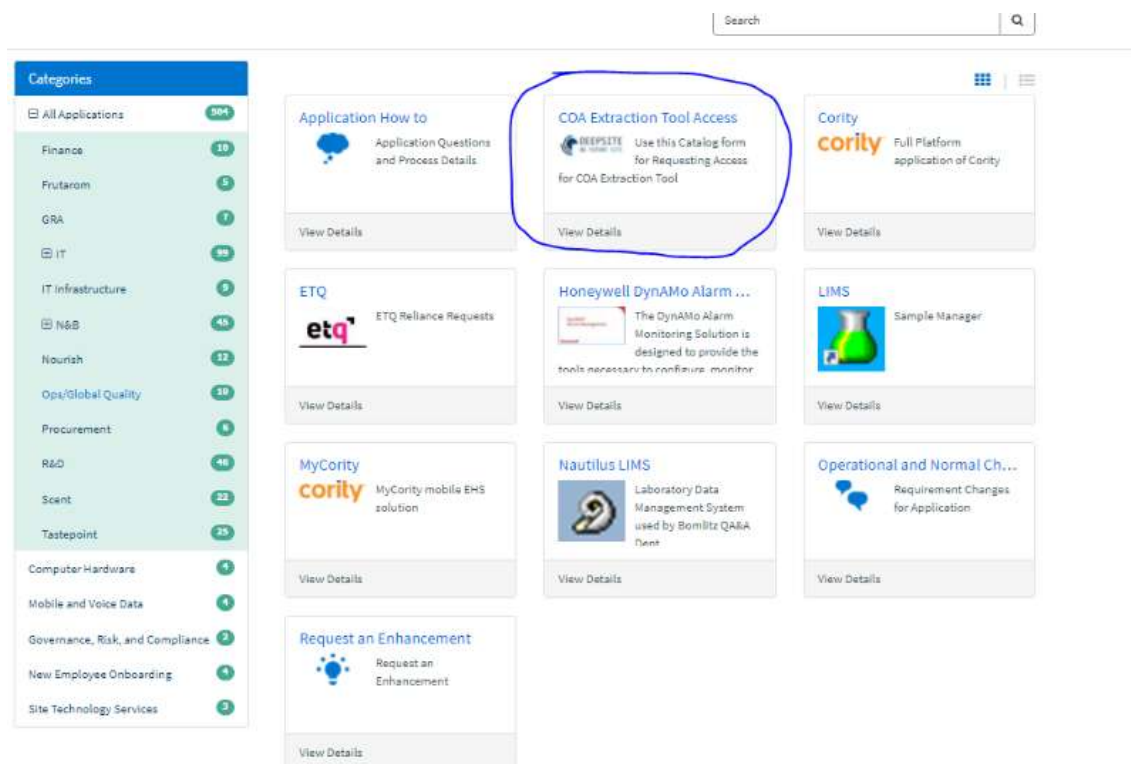
What's New on the IT Service Catalog: New Forms in Service Portal

2. Then click “Ops/Global Quality” Button.



© 2020 Copyright: IFF.com

3. Then click “COA Extraction Toll Access (DEEPSITE Document Insider System)” Button.



Step 2: Filling out the Ticket Form

Use this Catalog form for Requesting Access for COA Extraction Tool

* Indicates required

* Requested for

Requested by

Title

* Please select the type of Access

-- Select --

* Target Document Type

-- Select --

OC

COA

NB_COA

Packaging

1. Choose "Packaging" as the "Target Document Type".
2. Choose Role Types

Role Type	Access	User Profile	Permission Level
Viewer	view access site	users/technicians	default
Contributor	edit/contribute access	super users	restricted

Users belonging to different role types will have different permissions. Viewer can only access the portal/interface (read only), review, upload and download documents. Contributor can access the portal/interface, edit the extracted value, revise the harmonized result and manage the Cases. For the detailed permissions associated with different user role, please refer to the table below.

Main Functions	Viewer	Contributor
Search and Filter	√	√
Review and Download Spec PDF	√	√

Main Functions	Viewer	Contributor
Edit Extraction Result of Spec		√
Report Issue in Spec Page	√	√
Upload Spec Documents	√	√
Change Extraction Status		√
Access and Review Case Page	√	√
Upload Spec to a Case	√	√
Save As/ Duplicate a Case		√
Edit the Spec for a Case		√
Change Case Status (Confirmed or Reviewing)		√
Delete a Case		√
Remove a clustered Spec from a Case		√
Generate Export Digital Spec in Case Page	√	√
Choose the desired drawings provided by AI		√
Capture the desired drawings by system built in tool manually		√

Step 3: Submit and Tracking Your Ticket

1. After submitting your request ticket, IFF Service Now team will process your request and then transfer it to DEEPSITE support team and our support team will receive the corresponding ticket as shown below:

Dear Deepsite Team,

Please check the details of : REQ0400911.

Request Opened by: Sravani Chebolu

Requested for: Sravani Chebolu

Requested for Email Address: SRAVANI.CHEBOLU@IFF.COM

Type of Access: Viewer

Target Document Type: Packaging

Description: Testing on stage

Also, Kindly check the [link](#) for KB article.

Regards,

IFF IT

Figure 1: Log on

If required, you can communicate with the support team through comments or by updating your ticket.

2.2 Logging on

Clicking the “Document Insider” icon in IFF Okta Dashboard page or you can enter the URL <https://document-insighter.godeepsite.com> in your browser to access the login page as shown:

Access DEEPSITE Document Insider®

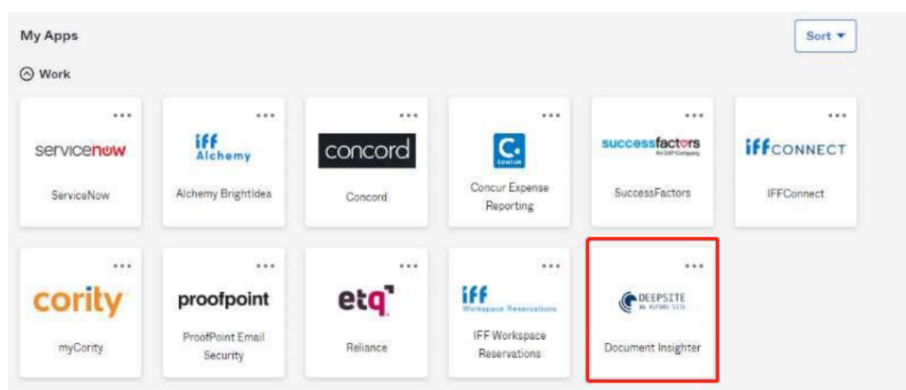


Figure 2: App page

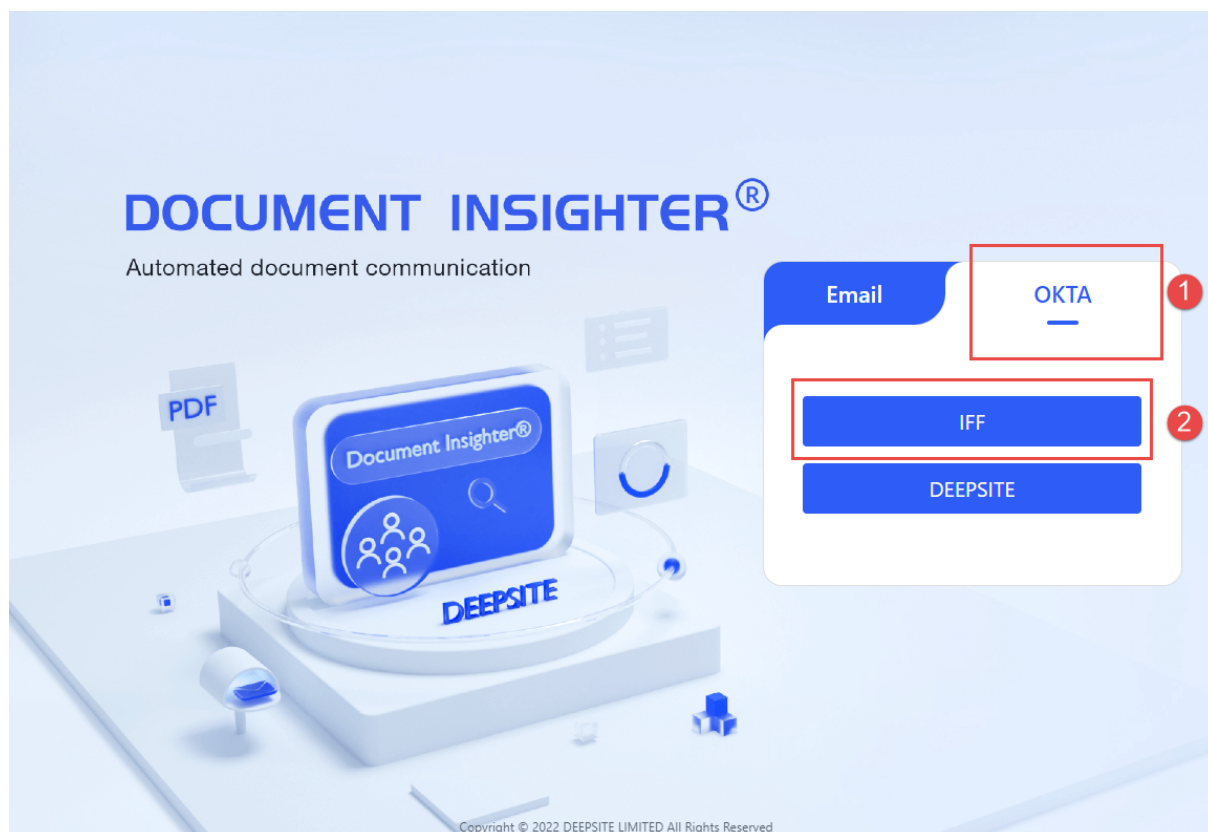




Figure 3: Log on

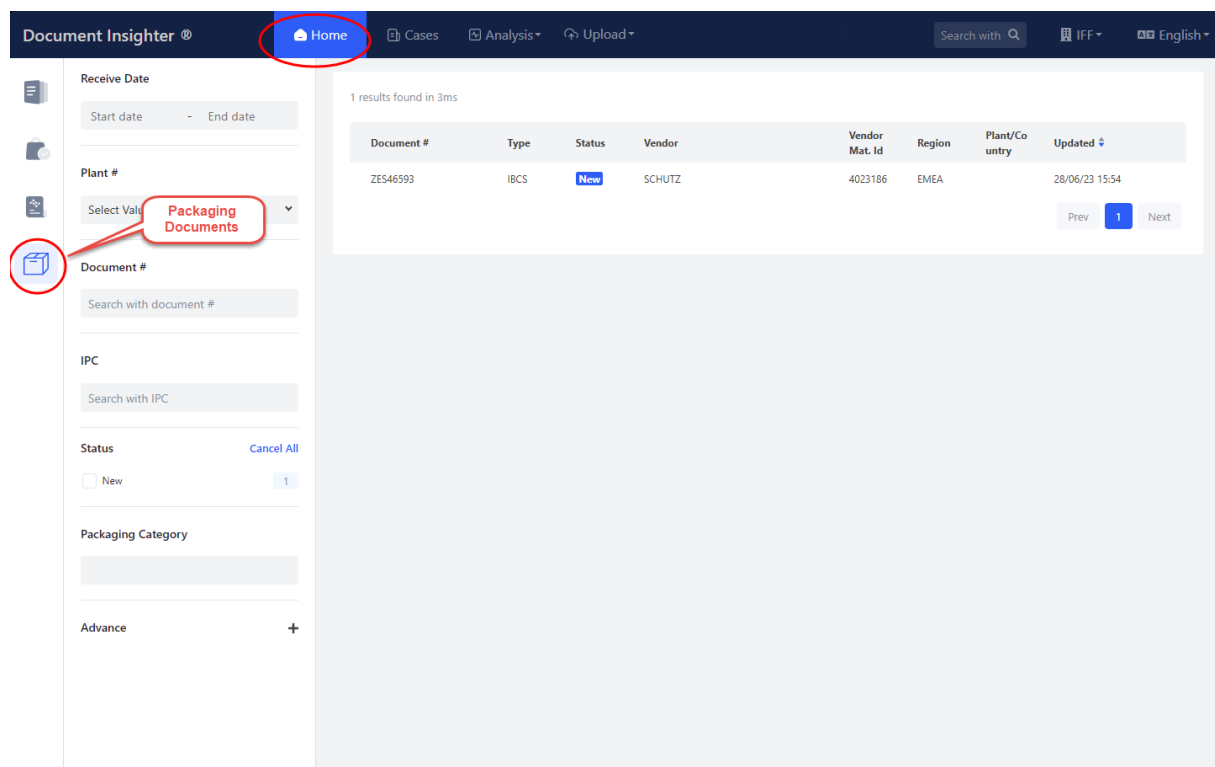
To access the DEEPSITE Insider portal, follow these steps:

1. Click on the “OKTA” button .
2. From the options provided, select “IFF” .
3. Enter your IFF ID and password in the designated fields.

Once you have completed these steps, you will be successfully logged in to the DEEPSITE Insider portal.

2.3 Homepage

The system can archive data automatically with convenient and rich search capabilities. After logging in, click the “Home” button in the top ribbon to enter the home page, as shown.

**Figure 4:** Home Button

The left filter panel provides users with more detailed classification and filtering functions:

1. “Receive Date”: The email received date or uploaded date.
2. “Document #”: The number of processed document. By default, the Packaging Material ID is used as the Document #.
3. “Plant #”: Filter all the extractions by IFF Plant ID.
4. “Status”: Following up status such a “Posted”, “Modified”, etc.
5. “Vendor Name”: Filtered by vender name.
6. “Packaging Category”: Filter all the extractions by packaging document category, such as Drums, Cartons, Jerrycans etc..

Receive Date

Start date - End date

Plant #

Select Values

Document #

Search with document #

IPC

Search with IPC

Status

☐ New

Cancel All

1

Packaging Category

Advance

+

Figure 5: Search/Filter Panel

2.3.1 Quick Search Area

Users can quick access the search function at the top ribbon from any page. After entering the Document # here, it will jump to the corresponding review page.

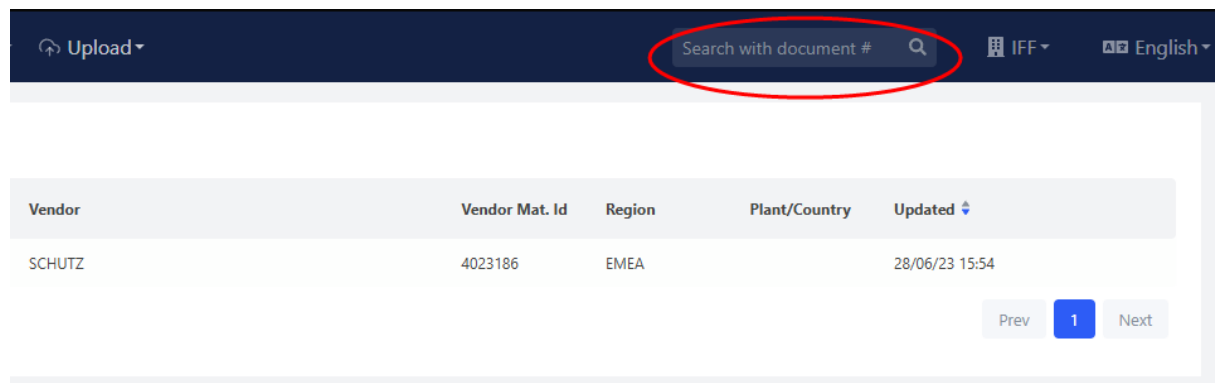


Figure 6: Quick Search Area

2.4 Spec Page

2.4.1 Display and download the original packaging documents

Upon successfully logging in, the Packaging document will be displayed on the left-hand side of the page. In addition, users can download a PDF version of the document by simply clicking the download button.

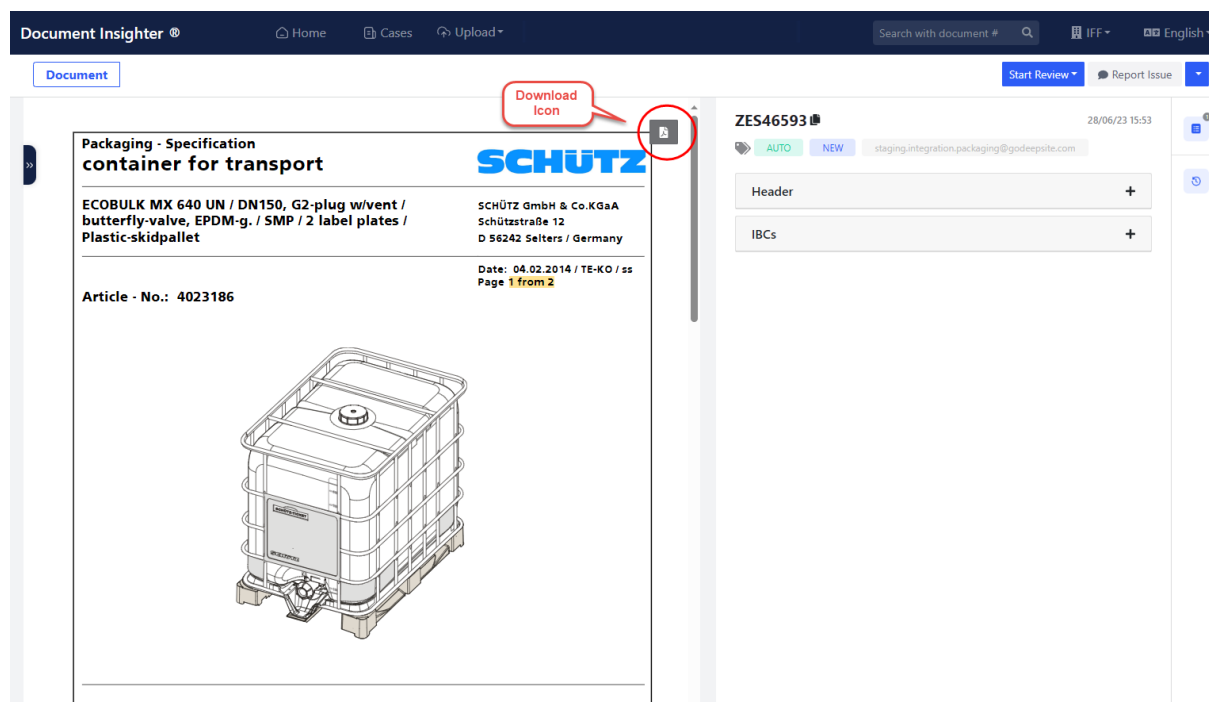



Figure 7: Download PDF

2.4.2 Extracted Result Display

The extracted data will be displayed on the right side of the page. Our Ontology Engine automatically maps the extracted values to the standard value option. To view the historical extracted records of the packaging document, click button  in the image below. This feature is particularly useful when there are multiple versions of the document with the same Document #:

Document Insighter® Home Cases Upload Search with document # IFF English

Document Start Review Report Issue

Document

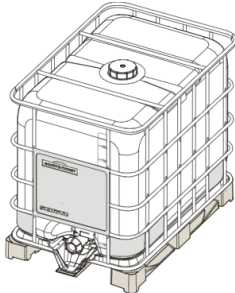
Packaging - Specification container for transport SCHÜTZ

ECOBULK MX 640 UN / DN150, G2-plug w/vent / butterfly-valve, EPDM-g. / SMP / 2 label plates / Plastic-skidpallet

SCHÜTZ GmbH & Co.KG&A
Schützstraße 12
D 56242 Seifers / Germany

Date: 04.02.2014 / TE-KO / ss
Page 1 from 2

Article - No.: 4023186



Technical data:
Nominal Capacity: 640 Litres

ZES46593 28/06/23 15:53
AUTO NEW staging.integration.packaging@godeepsite.com

Header

Material ID	ZES46593	✓
Category	IBCS	✓
UN Code	UN 31HA1/Y .../ BAM0382	✓
Vendor Material Id	4023186	✓
Vendor Name	SCHUTZ	✓
Vendor Region	EMEA	✓

IBCs

Packaging Material	Plastic	✓
IBC Sub-category	With Liner	✓
Material Inner	Plastic	✓
Material Outer	Plastic	✓
Volume	640	✓
Volume UOM	L	✓
Length	1200	✓

Copyright © 2022 DEEPSITE LIMITED All Rights Reserved

Figure 8: Extracted Result

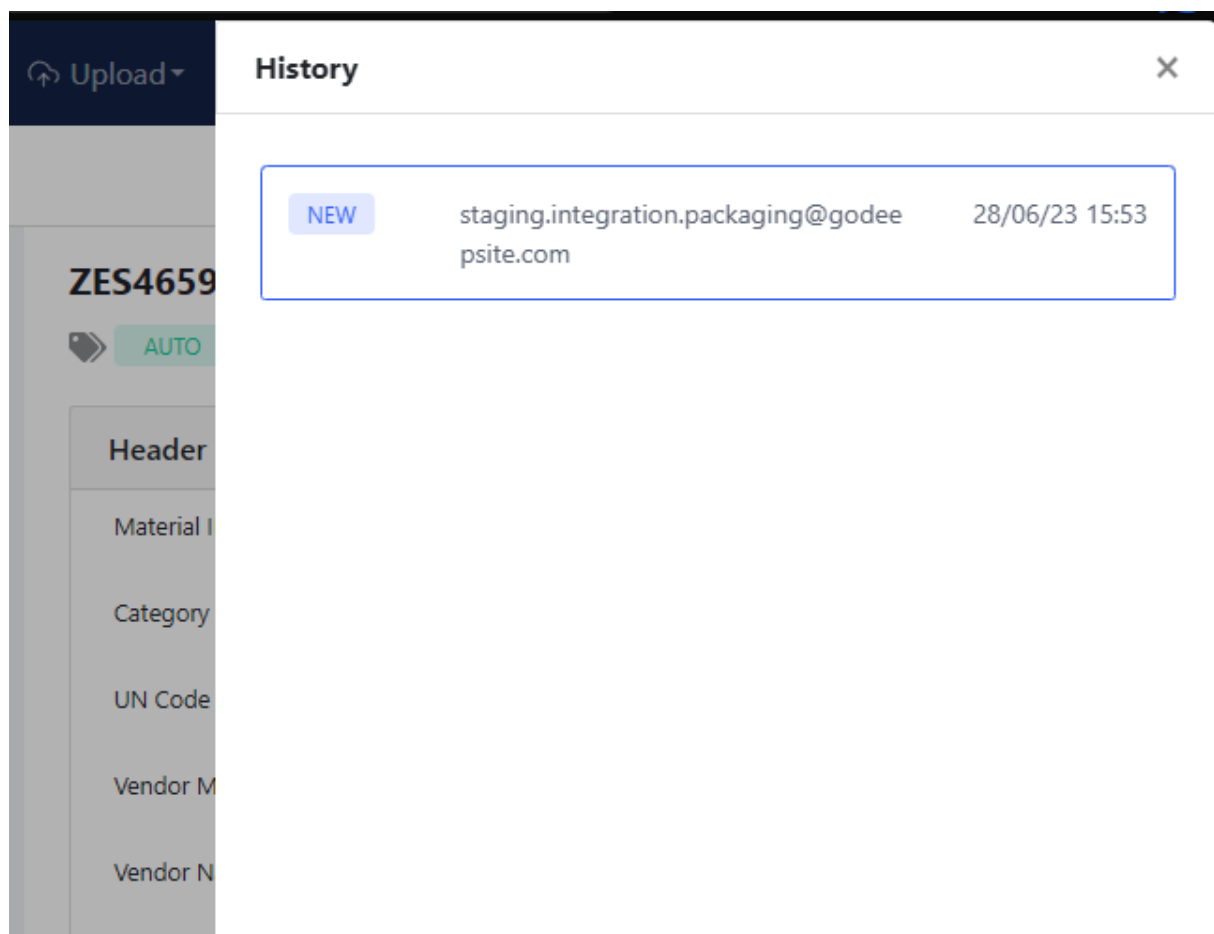



Figure 9: Extracted Records


2.5 Main Functions for Spec Page

2.5.1 Revise Extracted Results

1. For the field that users (Contributor only) want to modify, they can clear the existing content, and the system will automatically display all available options for users to select again. Alternatively, users can directly enter the desired modification. After making the changes,

ZES46593 

28/06/23 15:53

 **AUTO** **NEW** staging.integration.packaging@godeepsite.com

Header

Material ID

Category

UN Code

Vendor Material Id

Vendor Name

Vendor Region

IBCs

Packaging Material

IBC Sub-category

Material Inner

Material Outer

Volume

Volume UOM

Length

Steel

Composite with Plastic Liner Receptacle

Plastic/Woven Plastic/Plastic Film/Polyethylene/PE...

Rigid Plastic

Aluminum

Natural Wood

Plywood

Reconstituted Wood

Fiberboard

With Liner

Plastic

Plastic

640

L

1200

✓

✓

✓

✓

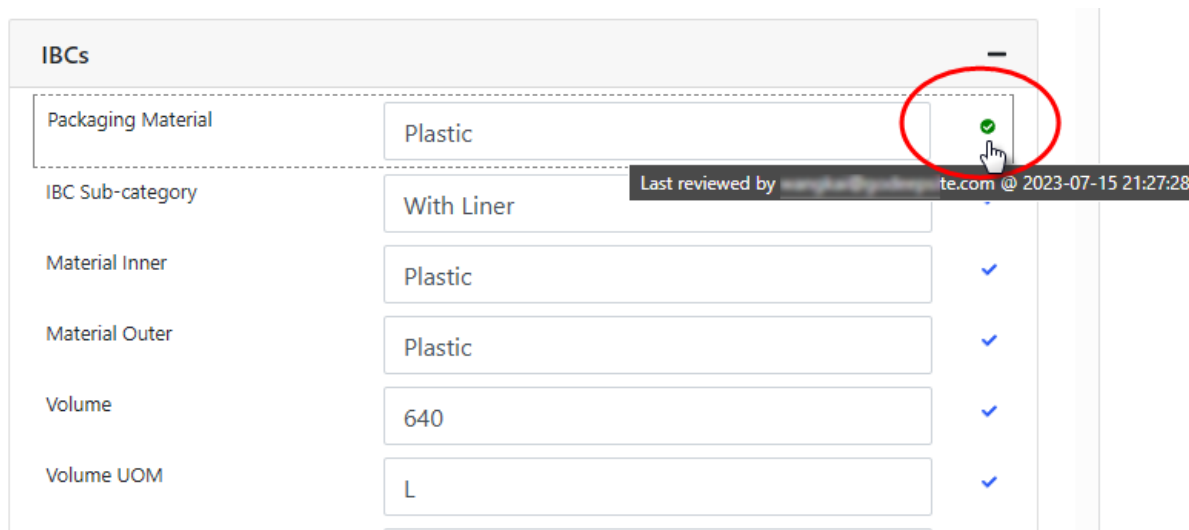
✓

✓

Save Button

Figure 10: Revise Results

2. Please remember to click on the blue checkmark icon on the right to save the changes to the field.
3. Once saved, the icon will change to the following style, and hovering the mouse over it will display the modification record.



The screenshot shows a form titled "IBCs" with several input fields. The "Packaging Material" field is set to "Plastic" and has a green checkmark icon on its right side, which is circled in red. Below it, the "IBC Sub-category" field is set to "With Liner". To the right of the "IBC Sub-category" field, there is a tooltip that reads "Last reviewed by [redacted]@te.com @ 2023-07-15 21:27:28". Below the "IBC Sub-category" field, there are four more fields: "Material Inner" (set to "Plastic"), "Material Outer" (set to "Plastic"), "Volume" (set to "640"), and "Volume UOM" (set to "L"). Each of these four fields has a blue checkmark icon on its right side.

Field	Value	Status
Packaging Material	Plastic	Green Checkmark
IBC Sub-category	With Liner	Blue Checkmark
Material Inner	Plastic	Blue Checkmark
Material Outer	Plastic	Blue Checkmark
Volume	640	Blue Checkmark
Volume UOM	L	Blue Checkmark

Figure 11: Revise Icon

2.5.2 Change Extraction Status

1. Once the user has made changes and saved some field values, the status will change from "New" to "REVIEWING". If the user confirms that all extraction results are correct, they can confirm and lock the extraction by clicking the "Confirm" button located in the top right corner.

ZES46593

AUTO **REVIEWING** staging.integration.packaging@godeepsite.com

Confirm **Report Issue**

Confirm
Invalid

Header	
Material ID	ZES46593 ✓
Category	IBCS ✓
UN Code	UN 31HA1/Y .../ BAM0382 ✓
Vendor Material Id	4023186 ✓
Vendor Name	SCHUTZ ✓
Vendor Region	EMEA ✓

IBCs	
Packaging Material	Plastic ✓
IBC Sub category	

Figure 12: Change Status

2. By clicking “Yes”, the extraction status will change from “Reviewing” to “Confirmed”, and all extraction values will be locked and cannot be edited.

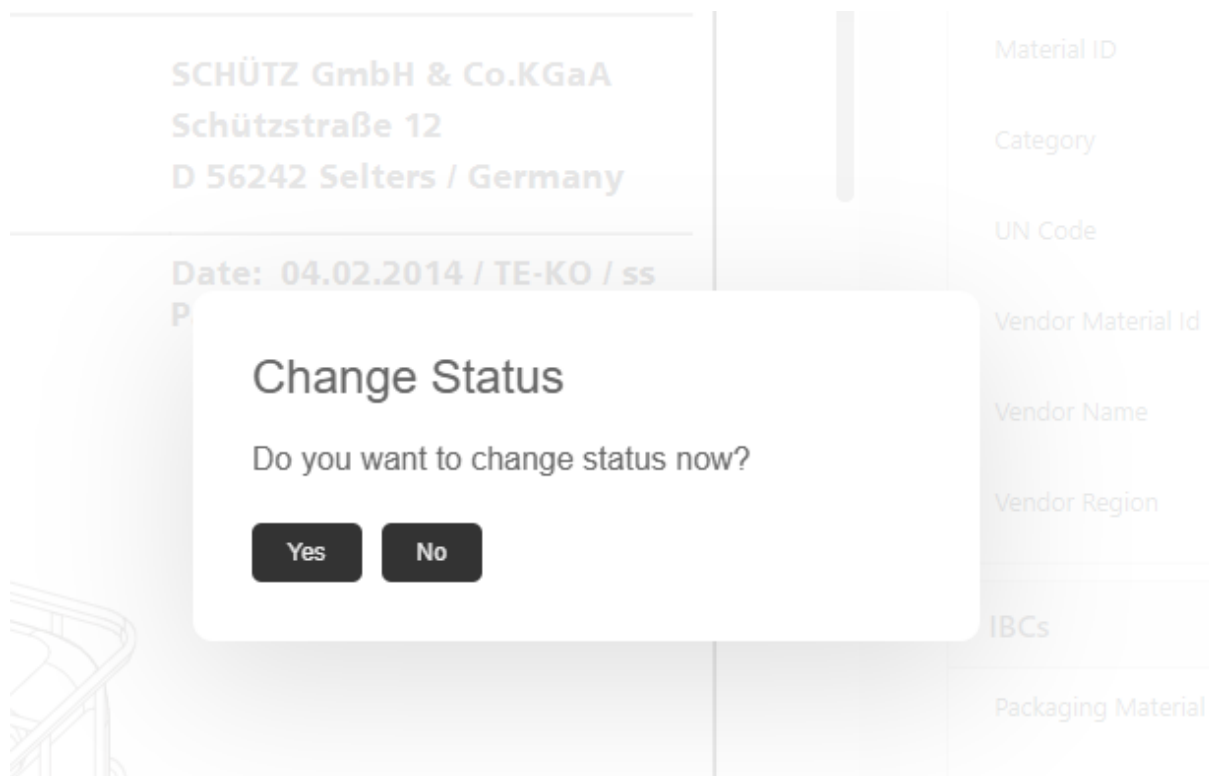
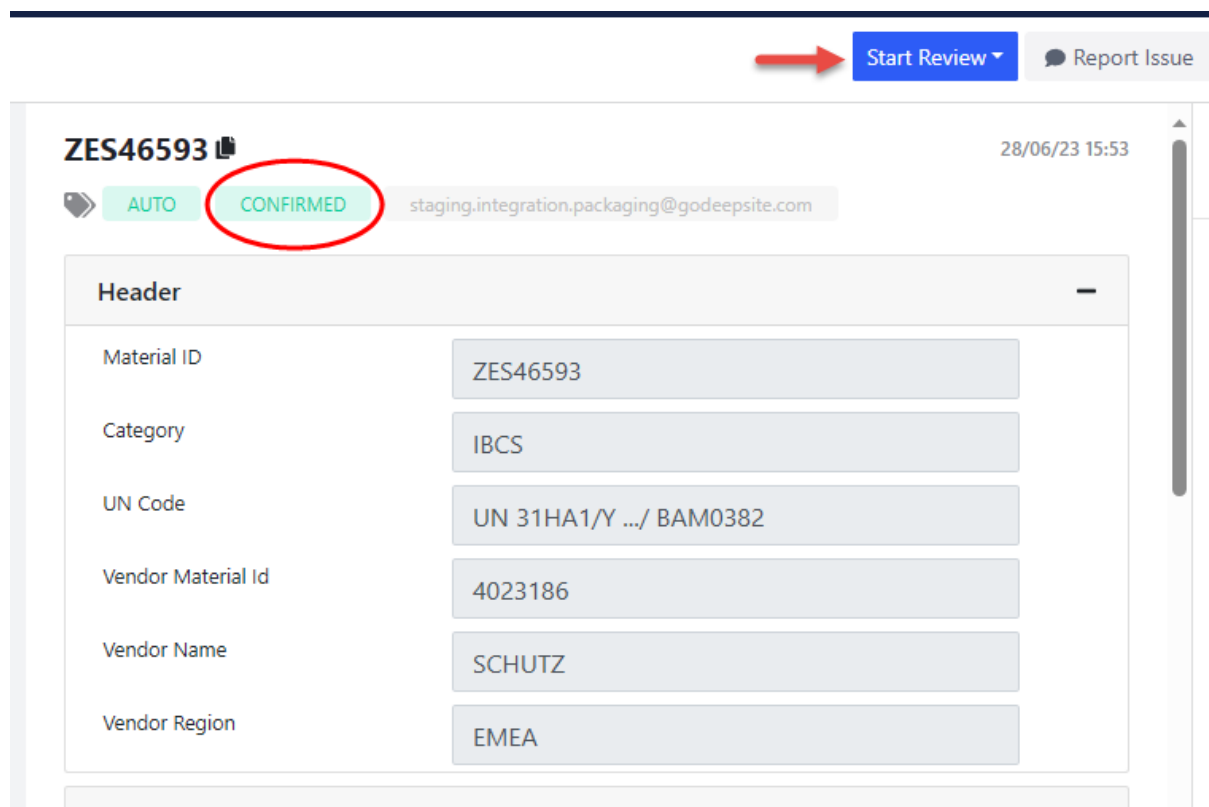


Figure 13: Change Status

3. Clicking the “Start Review” button at the same location again restores the ability to modify and edit, and the status will change back from “Confirmed” to “Reviewing”.



ZES46593 28/06/23 15:53

AUTO **CONFIRMED** staging.integration.packaging@godeepsite.com

Header

Material ID	ZES46593
Category	IBCS
UN Code	UN 31HA1/Y .../ BAM0382
Vendor Material Id	4023186
Vendor Name	SCHUTZ
Vendor Region	EMEA

Figure 14: Change Status

2.5.3 Issue Report

For most cases, even in some new formats, our A.I. engine can automatically detect and extract the tables and data points that users are interested in. For some processing failure cases, the system needs to collect samples in order to finetune the model and continuously optimize model performance. The system will collect user feedback on extraction issues in the following ways:

1. Send email directly to support@godeepsite.com for issues like:

- 1 * Cannot access the Insider web portal
- 2 * Insider system related question or queries
- 3 * Or other general issues

2. Report issue for a specific COA document:

- 1 Report issue manually by clicking the "Report "Issue button. Pick an issue category, like "IPC/"Extraction and leave your comment in the dialog.

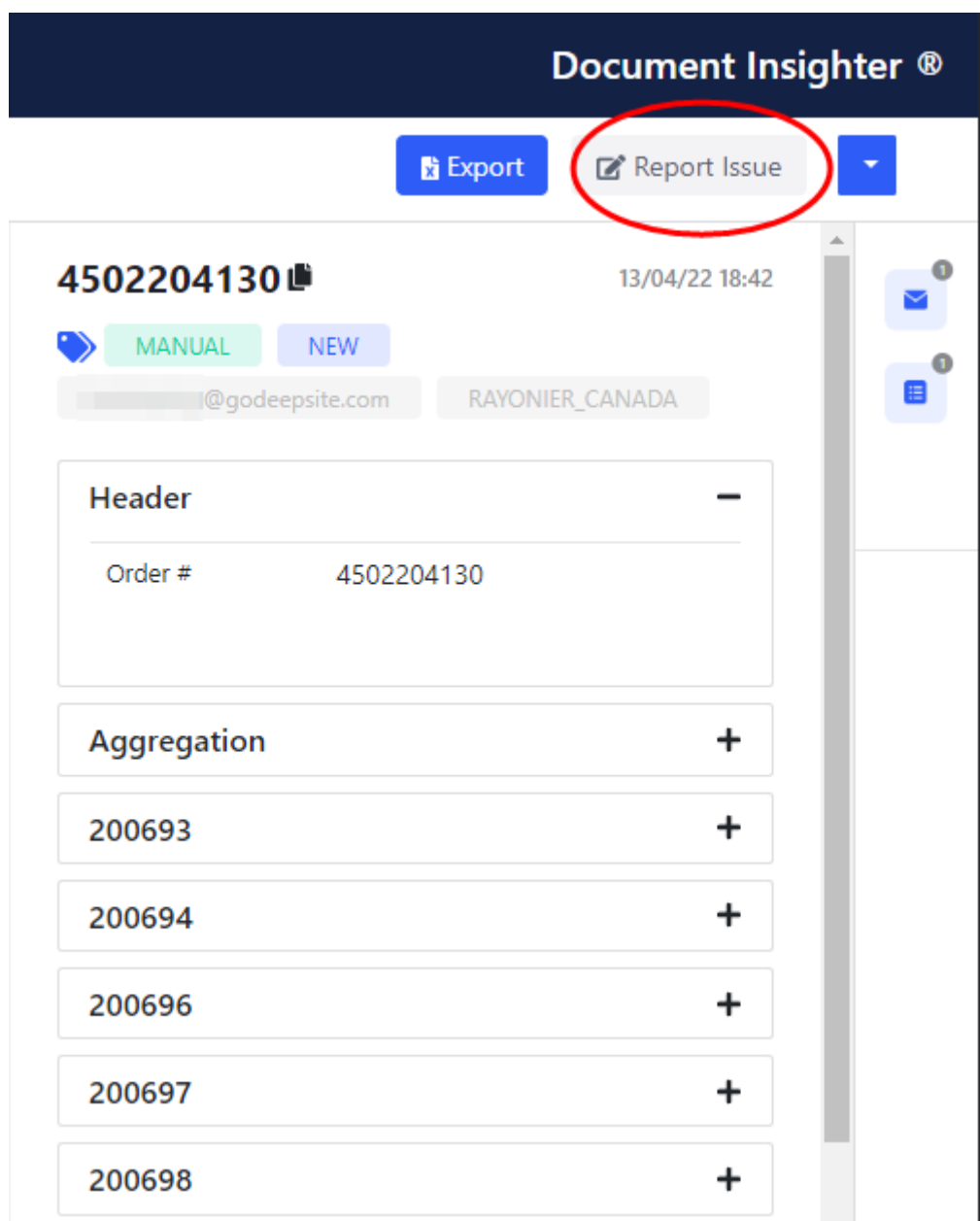



Figure 15: Report Issue Button

The screenshot shows a web application interface with a 'Document Insighter' header. On the left, a document preview is visible, showing a 'Certificate of Analysis' for 'DOW BEHELVX B.V.' with a date of '2021-04-15'. A 'Report Issue' modal is open on the right. The modal has a title bar with a close button. The main content area of the modal contains the text 'Please select category, and type comment to report issue'. Below this, there is a 'Category' dropdown menu, an 'Order #' dropdown menu, and a 'Comment' text area. A blue 'Submit' button is located at the bottom of the modal. The background document preview shows a 'DOW' logo and a 'Certificate of Analysis' section with fields for 'Product Number' (00000062746) and 'Product Name'.

Figure 16: Report Issue Options

3. Users can check the status of following up and review all the support cases/issues they reported by clicking the button  to open the “My Support Cases” page.

The screenshot shows the Document Insighter interface. At the top, there is a search bar with the text "Search with document #" and a magnifying glass icon. To the right of the search bar is a dropdown menu labeled "IFF" with a downward arrow. Below the search bar, there is a blue button labeled "Expo". To the right of the "Expo" button is a settings gear icon. Below the settings gear icon is a list of menu items: "Settings", "Subscription Usage", "My Upload Log", "My Support Cases" (highlighted with a red box and a red circle with the number 1), and "NB COA User Manual". Below the menu items is the email address "quality.test.coa@godeepsite.com (iff)" and a "Sign out" button. On the left side of the interface, there is a header section with the text "4560046315" and a "NEW" button. Below the header is a section titled "Aggregation" with a sub-section "Test Parameters". The "Test Parameters" section contains a table with the following data:

	Avg	Min	
Moisture Content (%) Moisture (%)	6.98	6.96	6.99
Basis Weight OD (g / m2) Basic Weight	840	840	840
ISO Brightness (%) Brightness	84.7	84.5	84.8
Thickness (mm)	1.66	1.65	1.66
Calculated alphacellulose (%)	95.4	95.4	95.5

Figure 17: My Support Cases

- 1 * The system will forward **this** issue to our Technical Support team, the team will follow up on the issue, and update you within 4 days.

2.6 Case Page (Harmonized Result)

2.6.1 Harmonized Result Display

2.6.2 Filter Panel

2.6.3 Case Management/Manage Harmonization Results

1. Edit result: Users can edit the extracted result and clicking the green checkmark icon on the right side to save the changes. Also users can pick extracted value from the right side Spec extraction panel.

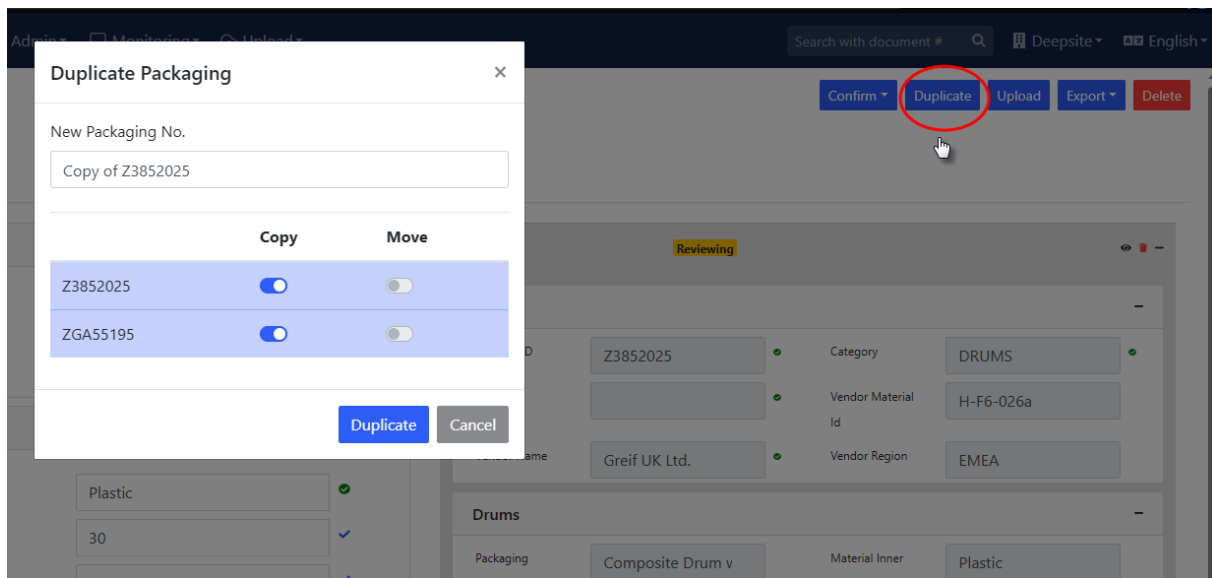
The screenshot displays the 'Edit Result' interface for a case with Material ID Z3852025 and Category DRUMS. The interface is divided into two main sections: the 'Case Panel' on the left and the 'Spec Extraction Panel' on the right.

Case Panel: This panel contains a 'Header' section with fields for Material ID (Z3852025), UN Code, and Category (DRUMS). Below this is a 'Drums' section with various specifications, including Packaging Material (Composite Drum with Liner Rece), Material Outer (Steel), Volume UOM (L), Color Bottom, Height, Dimension UOM, Thickness Body, Thickness UOM, and Packing Group. The 'Volume' field is highlighted with a red box and a green checkmark icon on the right.

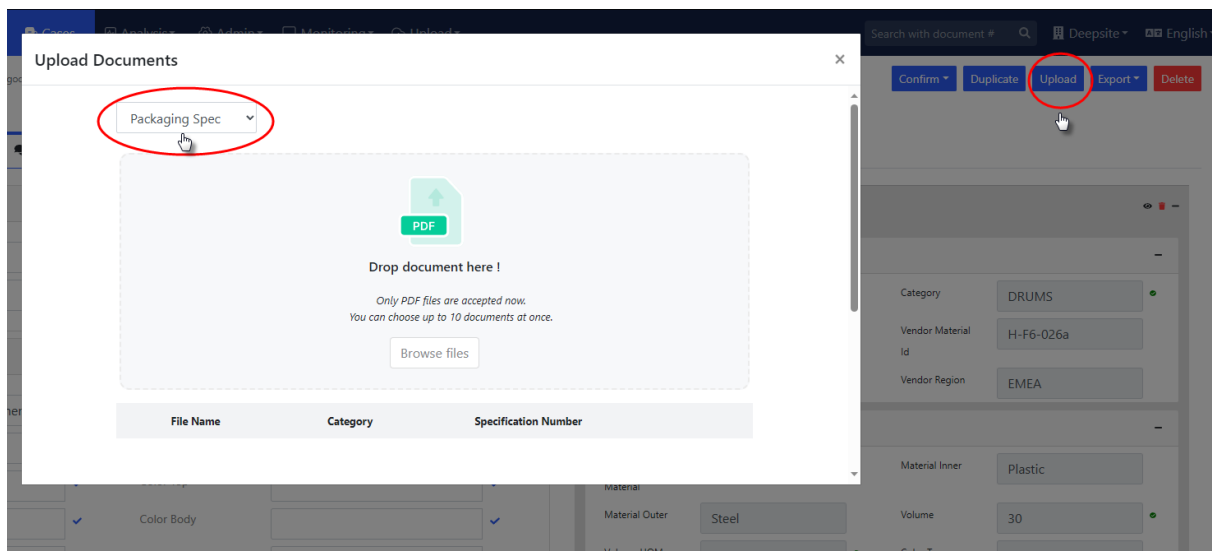
Spec Extraction Panel: This panel shows a list of extracted values for the same fields. The 'Volume' field is highlighted with a red box and a green checkmark icon on the right. A red arrow points from the 'Volume' field in the Case Panel to the 'Volume' field in the Spec Extraction Panel. A red callout box points to the 'Spec Extraction Panel' with the text 'Spec Extraction Panel Press the \"+\" to expand the panel'.

Figure 18: Edit Result

2. Save as: Users can save/duplicate the current result as a new case by clicking the "Duplicate" button.

**Figure 19:** Duplicate Result

3. Upload a new Spec to current Case: Users can upload a new packaging document to the current case by clicking “Upload” button and selecting “Packaging Spec” as extraction module. The system will automatically extract the data from the new document.

**Figure 20:** Upload Spec

4. Change Status: Users can click the “Confirm” button to confirm the extraction result. The status will change from “Reviewing” to “Confirmed”, and all extraction values will be locked and can-

not be edited. Clicking the “Start Review” button at the same location again restores the ability to modify and edit, and the status will change back from “Confirmed” to “Reviewing”. Also users can click “Invalid” button to mark the current case as invalid.

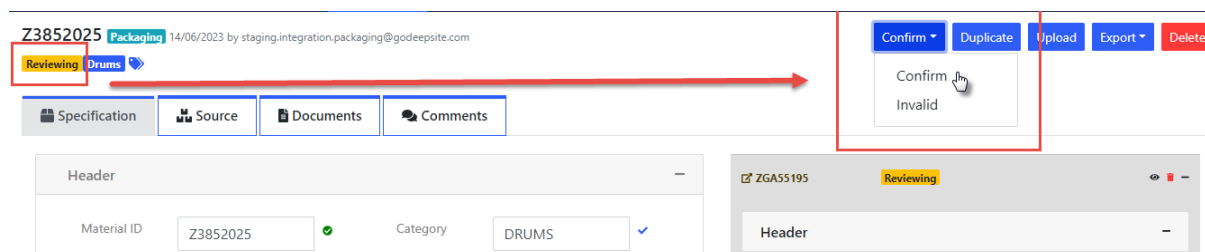


Figure 21: Change Status

5. Delete a case: Users can delete a whole case from a packaging category by click the “Delete” button.
6. Remove a clustered Spec from a Case: Users can remove a clustered Spec from a case by clicking the “Dustbin” icon. Only the connection between the Spec document and the Case will be removed, the extraction of the Spec will not be deleted

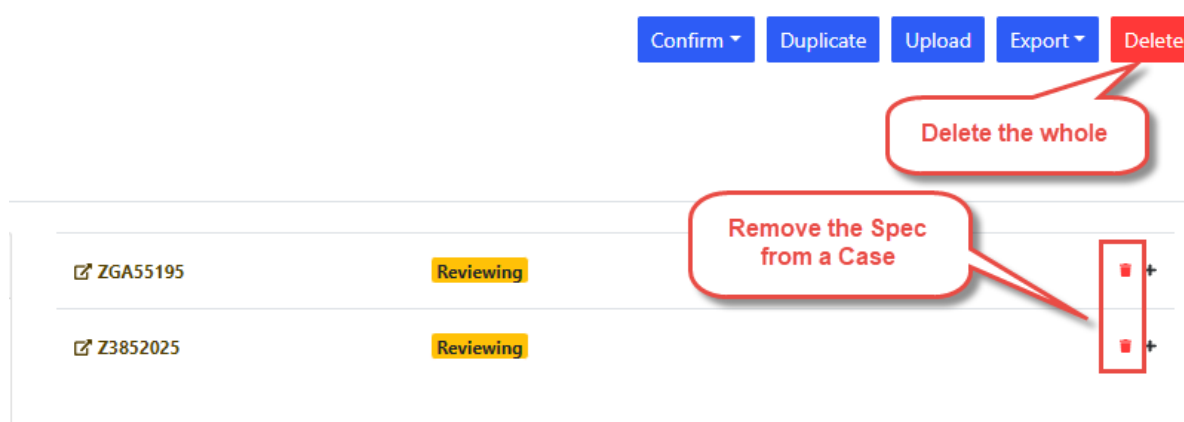


Figure 22: Remove Spec

2.6.4 Export Harmonized Result

1. Generate and Export Digital Spec for a case or a single spec to a WORD file:

The system will generate a digital spec for the case and export it to a WORD file. The digital spec will include all the extracted data from the Spec documents in the case. The digital spec will be generated based on the template of the packaging category. If the template is not available,

the system will generate a default template. The system will also provide a PDF version of the digital spec.

The screenshot displays the Document Insighter web application interface. At the top, a dark blue navigation bar contains the logo, 'Home', 'Cases', and 'Upload' links, along with a search bar and language settings. Below this, a header section shows the case ID 'Z3852025', a 'Packaging' tag, a date, and a user email. Action buttons for 'Confirm', 'Duplicate', 'Upload', 'Export', and 'Delete' are visible, with 'Export' highlighted by a red circle. The main content area is divided into tabs: 'Specification', 'Source', 'Documents', and 'Comments'. The 'Specification' tab is active, showing a form with fields for 'Material ID' (Z3852025), 'UN Code', 'Category' (DRUMS), and a 'Drums' section with various attributes like 'Packaging Material' (Composite Drum), 'Material Inner' (Plastic), 'Material Outer' (Steel), 'Volume' (30), 'Color Top', 'Color Body', 'Height', 'Diameter', 'Thickness Top', and 'Thickness Bottom'. A right sidebar shows a list of cases with 'Z3852025' selected.

Figure 23: Export Case

By default, the data in the case will be exported to the following template:

IFF Packaging Specification

Z3852025

Header

Material ID	Z3852025
Category	DRUMS
UN Code	

Drums

Packaging Material	Composite Drum with Liner Receptacle
Material Inner	Plastic
Material Outer	Steel
Volume	30
Volume UOM	L
Color Top	
Color Bottom	
Color Body	
Height	
Diameter	
Dimension UOM	
Thickness Top	
Thickness Body	
Thickness Bottom	
Thickness UOM	
<u>Drum Head</u> Type	Non-Removable Head
Packing Group	

Figure 24: Word Template

If users want to export the data from a single Spec document, they can click the “Export” button on the Spec extraction page:

The screenshot displays the 'Document Insighter' interface. On the left, a spec document titled 'Packmittel-Spezifikation' by 'Dow Wolff Cellulosics GmbH' is shown. The document includes fields for 'Herausgeber', 'Gültigkeitsdatum', 'Packmittel-Nr.', 'Änderungshinweise', 'Kurztext', 'B+K-Material-Nr.', 'Abmessungen', 'Masse', 'Werkstoffe', 'Druck', 'Annahmebedingungen', 'Verpackung', and 'Bemerkung'. On the right, a sidebar shows the 'Header' and 'Bags' sections. The 'Header' section includes fields for 'Material ID', 'Category', 'UN Code', 'Vendor Material Id', 'Vendor Name', and 'Vendor Region'. The 'Bags' section includes fields for 'Subcategory', 'Packaging Material', 'Type', 'Length', 'Width', 'Bottom Dimension', and 'Dimension UOM'. The 'Export' button is highlighted in the top right corner of the interface.

Figure 25: Export Spec

2. Export Multiple Cases to a Excel file for preparing RFP/Bidding
3. Choose Design Drawings for a case from AI Drawings Cut Outing Tool

3 Manually Uploading Packaging Document

3.1 Uploading via Insighter Portal

On the homepage of the Insighter portal, users can click the “Upload” -> “Documents” button to access the packaging documents upload page:

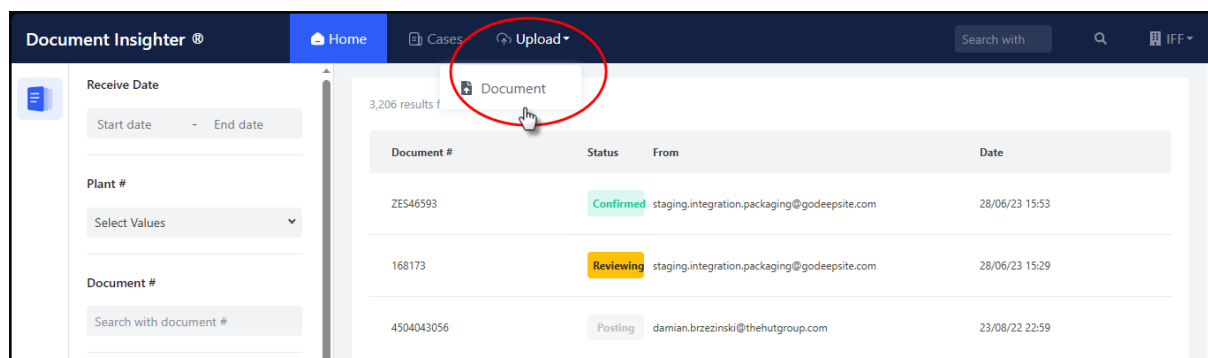


Figure 26: Uploading via Portal

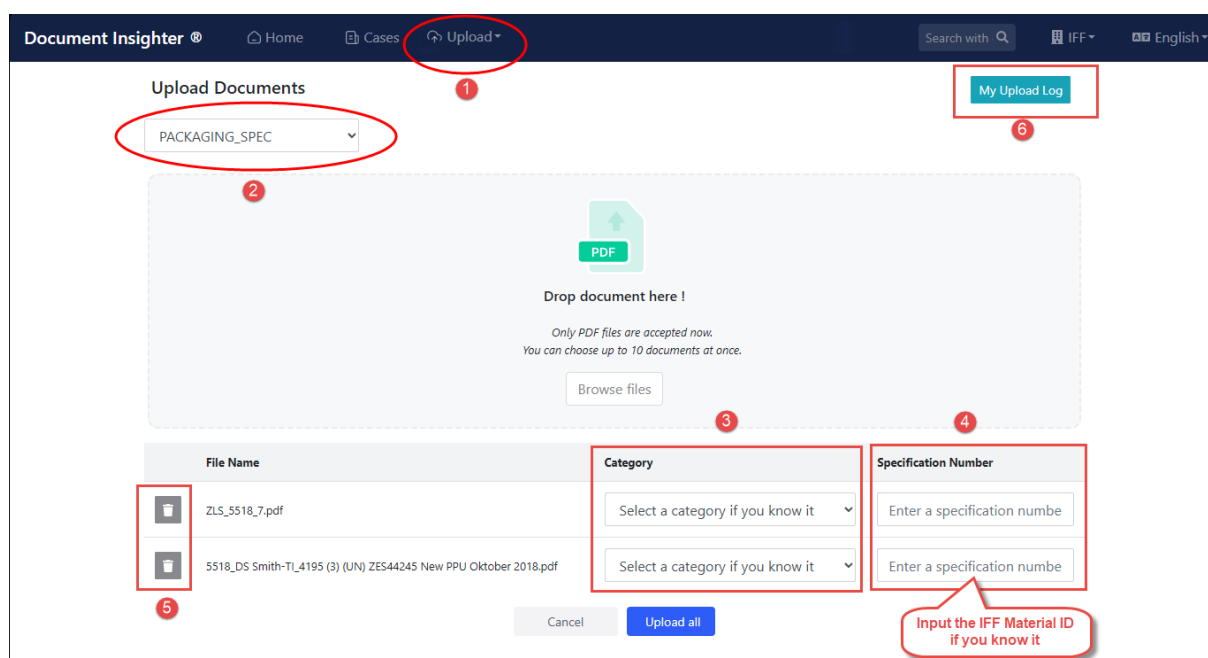


Figure 27: Input Order# and IPC

Select 'PACKAGING SPEC' from the dropdown menu, and then drag or manually choose the desired PDF file to upload. Before clicking 'Upload' to complete the file upload, make sure to select the corresponding 'Packaging Category' for each file, such as 'Drums', 'IBCs', etc., and enter the relevant IFF Material Code/ID as the default Document/Specification Number. Users can also delete the files from the uploading list. View and the check the upload log by clicking the 'My Upload Log' button.

Please note that:

- Only PDF files are accepted now.
- Users can choose up to 10 documents at once.

- The system tries to read order #, IPC, and batch # from the document automatically. If the above information is not present in the document, please fill them in the list below.

3.2 Check Uploaded Files Status

On the homepage of the Insighter portal, users can click the “Account” button, then click “My Upload Log” to review all the process status of COA documents they uploaded before:

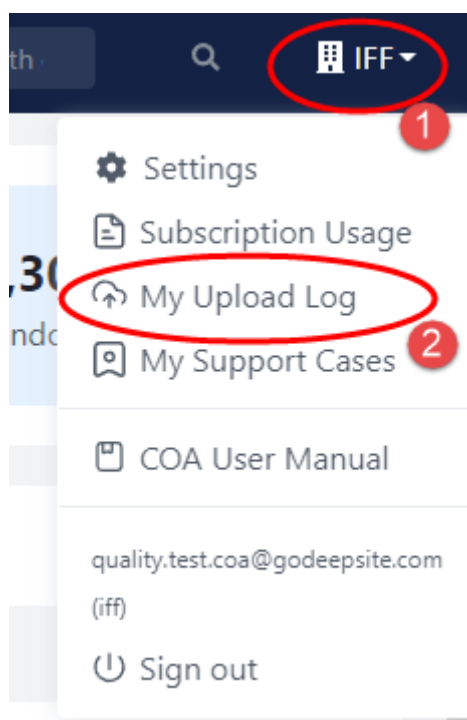


Figure 28: My Upload Log

Document Insighter Home Cases Analysis Search with DeepSite English

Status

- ☐ UPLOADED
- ☐ PROCESSING
- ☐ COMPLETED
- ☐ FAILED

Upload Logs

Date	Category	Status	Filename	Metadata	ExtractionsExtractions
26/04/22 18:54	COA	COMPLETED	4503651260_document.pdf	• poNumber: 4503651260	Quick view
24/04/22 00:45	COA	COMPLETED	4503965090_document.pdf	• poNumber: 4503965090	Quick view
19/04/22 13:40	COA	COMPLETED	4503964391_document.pdf	• poNumber: 4503964391	Quick view
10/04/22 01:00	COA	COMPLETED	4503922660_document.pdf	• poNumber: 4503922660	Quick view
09/04/22 23:56	COA	COMPLETED	4503894844_document.pdf	• poNumber: 4503894844	Quick view

Showing 61 - 65 of 65 items. << < 1 ... 3 4 > >>

Figure 29: Document Upload Status

Please note that:

- After uploading the file, if the status is “UPLOADED” means that the system has received the document user uploaded successfully.
- A moment later(around 2 mins), refresh the page, the status will become “COMPLETED”, users can check and view the processed results through the filtering function on the homepage. Input your email address to check all your uploaded file and the corresponding results:

Document Insighter Home Cases Upload Search with document # IFF

Product Name

Batch Number

Advance

Mail From/Upload By

david.curtin@iff.com

Mail

- ☐ Mail Only
- ☐ With Document

73,154 Email Count

561,458 Extraction Count

2,429 Vendor Count

4 results found in 2ms

Document #	Category	Status	From	Date
	NB COA	NEW	david.curtin@iff.com	03/10/22 17:02
	NB COA	NEW	david.curtin@iff.com	03/10/22 16:56
	NB COA	NEW	david.curtin@iff.com	03/10/22 16:56
	NB COA	NEW	david.curtin@iff.com	03/10/22 16:56

Prev 1 Next

Copyright © 2022 DEEPSITE LIMITED All Rights Reserved

Figure 30: Check Uploaded Files

4 Technical Support

Help desk information including responsible technical contact phone numbers for assistance is currently available at the following period.

- Phone Support +852 38931811 (9:30 – 18:00 HKT, Mon to Fri)
- Email Support: customer.service@godeepsite.com (service desk connected)