



- (51) International Patent Classification: *G06K 9/62* (2006.01) *G06F 17/30* (2006.01)
- (74) Agent: HUNT, Gregory A.; Jenkins, Wilson, Taylor & Hunt, P.A., 3015 Carrington Mill Boulevard, Suite 550, Morrisville, NC 27560 (US).
- (21) International Application Number: PCT/US2017/021898
- (81) Designated States (unless otherwise indicated, for every kind of national protection available): AE, AG, AL, AM, AO, AT, AU, AZ, BA, BB, BG, BH, BN, BR, BW, BY, BZ, CA, CH, CL, CN, CO, CR, CU, CZ, DE, DJ, DK, DM, DO, DZ, EC, EE, EG, ES, FI, GB, GD, GE, GH, GM, GT, HN, HR, HU, ID, IL, IN, IR, IS, JP, KE, KG, KH, KN, KP, KR, KW, KZ, LA, LC, LK, LR, LS, LU, LY, MA, MD, ME, MG, MK, MN, MW, MX, MY, MZ, NA, NG, NI, NO, NZ, OM, PA, PE, PG, PH, PL, PT, QA, RO, RS, RU, RW, SA, SC, SD, SE, SG, SK, SL, SM, ST, SV, SY, TH, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, ZA, ZM, ZW.
- (22) International Filing Date: 10 March 2017 (10.03.2017)
- (25) Filing Language: English
- (26) Publication Language: English
- (30) Priority Data: 15/069,913 14 March 2016 (14.03.2016) US
- (71) Applicant: SAGEWORKS, INC. [US/US]; 5565 Centerview Drive, Suite 201, Raleigh, NC 27606 (US).
- (84) Designated States (unless otherwise indicated, for every kind of regional protection available): ARIPO (BW, GH, GM, KE, LR, LS, MW, MZ, NA, RW, SD, SL, ST, SZ, TZ, UG, ZM, ZW), Eurasian (AM, AZ, BY, KG, KZ, RU, TJ, TM), European (AL, AT, BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HR, HU, IE, IS, IT, LT, LU, LV, MC, MK, MT, NL, NO, PL, PT, RO, RS, SE, SI, SK,
- (72) Inventors: KEOGH, Timothy, Francis; 47 Pinnacle Drive, South Burlington, VT 05403 (US). HAMILTON, Brian; 5565 Centerview Drive, Suite 201, Raleigh, NC 27606 (US).

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(54) Title: SYSTEMS, METHODS, AND COMPUTER READABLE MEDIA FOR EXTRACTING DATA FROM PORTABLE DOCUMENT FORMAT (PDF) FILES

¹⁰⁰ (57) Abstract: According to one method, the method occurs at a data file analyzer. The method includes identifying at least one document identifier associated with a first document in a portable document format (PDF) file. The method further includes determining, using the at least one document identifier, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information for indicating a size of the first detection area in the first document. The method also includes identifying, using a reference point identifier, the reference point in the first document. The method further includes identifying, using the offset value and the size information, the first detection area in the first document and extracting, by processing binary data of the PDF file, data within the first detection area of the first document.

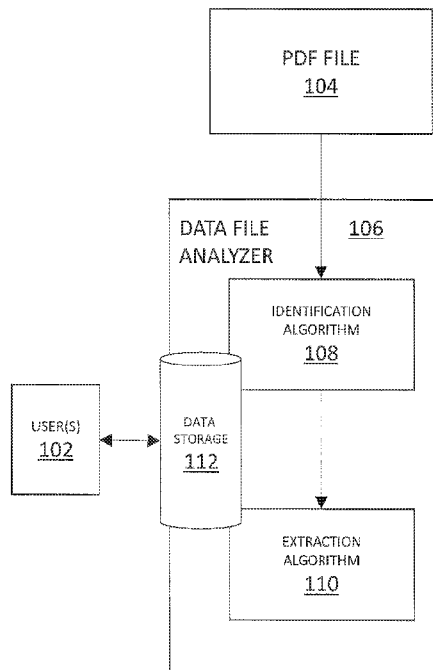


FIG. 1

WO 2017/160654 A2

SM, TR), OAPI (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, KM, ML, MR, NE, SN, TD, TG). **Published:**

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DESCRIPTION
SYSTEMS, METHODS, AND COMPUTER READABLE MEDIA FOR
EXTRACTING DATA FROM PORTABLE DOCUMENT FORMAT (PDF)
FILES

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PRIORITY CLAIM

This application claims the benefit of U.S. Patent Application Serial No. 15/069,913, filed March 14, 2016; the disclosure of which is incorporated herein by reference in its entirety.

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TECHNICAL FIELD

The subject matter described herein relates generally to data analysis and, more particularly, to systems, methods, and computer readable media for extracting data from portable document format (PDF) files.

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BACKGROUND

Manual data entry can be error-prone, tedious, and time consuming. However, there is a lack of easily automated methods for extracting data in a portable document format (PDF) and/or other data files. While some technologies, such as optical character recognition (OCR) technologies, exist for helping extract data from images, such technologies are imperfect and can result in various errors or misidentifications. Further, even using OCR technologies, data extraction generally requires a human to proofread and correct errors.

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SUMMARY

Methods, systems, and computer readable media for extracting data from a portable document format (PDF) file are disclosed. According to one method, the method occurs at a data file analyzer. The method includes identifying at least one document identifier associated with a first document in a PDF file. The method further includes determining, using the at least one document identifier, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information for

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indicating a size of the first detection area in the first document. The method also includes identifying, using a reference point identifier, the reference point in the first document. The method further includes identifying, using the offset value and the size information, the first detection area in the first document. The method also includes extracting, by processing binary data of the PDF file, data within the first detection area of the first document.

According to one system, the system includes a data file analyzer. The data file analyzer includes at least one processor and a memory. The data file analyzer is configured to identify at least one document identifier associated with a first document in a PDF file, to determine, using the at least one document identifier, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information for indicating a size of the first detection area in the first document, to identify, using a reference point identifier, the reference point in the first document, to identify, using the offset value and the size information, the first detection area in the first document, and to extract, by processing binary data of the PDF file, data within the first detection area of the first document.

The subject matter described herein may be implemented in software in combination with hardware and/or firmware. For example, the subject matter described herein may be implemented in software executed by a processor. In some implementations, the subject matter described herein may be implemented using a non-transitory computer readable medium having stored thereon computer executable instructions that when executed by the processor of a computer control the computer to perform steps. Exemplary computer readable media suitable for implementing the subject matter described herein include non-transitory devices, such as disk memory devices, chip memory devices, programmable logic devices, and application specific integrated circuits. In addition, a computer readable medium that implements the subject matter described herein may be located on a single device or computing platform or may be distributed across multiple devices or computing platforms.

As used herein, the term 'node' refers to at least one physical computing platform including one or more processors and memory. For example, a node may include a virtual machine and/or other software executing on a physical computing platform.

5 As used herein, the terms 'function' or 'module' refer to hardware, firmware, or software in combination with hardware and/or firmware for implementing features described herein.

BRIEF DESCRIPTION OF THE DRAWINGS

10 The subject matter described herein will now be explained with reference to the accompanying drawings of which:

Figure 1 is a diagram illustrating a computing environment according to an embodiment of the subject matter described herein;

15 Figure 2 is a diagram illustrating data associated with extracting data from a portable document format (PDF) file according to an embodiment of the subject matter described herein;

Figure 3 is a diagram illustrating a detection area associated with an Internal Revenue Service (IRS) Form 1065 according to an embodiment of the subject matter described herein;

20 Figure 4 is a diagram illustrating multiple detection areas associated with an IRS Schedule K-1 document according to an embodiment of the subject matter described herein;

25 Figure 5 is a diagram illustrating a conditional detection area associated with an IRS Schedule K-1 document according to an embodiment of the subject matter described herein;

Figure 6 is a diagram illustrating log data associated with extracting data from a PDF file according to an embodiment of the subject matter described herein;

30 Figure 7 is a diagram illustrating a graphical user interface for interacting with extracted data according to an embodiment of the subject matter described herein; and

Figure 8 is a diagram illustrating a process for extracting data from a PDF file according to an embodiment of the subject matter described herein.

DETAILED DESCRIPTION

The subject matter described herein relates to methods, systems, and computer readable media extracting data from portable document format (PDF) files and/or data files. Digital documents, e.g., documents stored in PDF files and/or other data files, may include tabular data and/or semi-constrained data. For example, tax and/or accounting programs may generate Internal Revenue Service (IRS) tax forms containing text, values, and/or other data and may store these forms in a PDF file. While a particular IRS tax form (e.g., an IRS Form 1040) for a given year is somewhat uniform in its content and layout, every tax and/or accounting program may generate a slightly different version of the form with various data in slightly different locations. As such, even with a data file containing semi-constrained data, various issues can arise when attempting to export, extract, or obtain data from the data file.

In accordance with some aspects of the subject matter described herein, techniques, methods, or mechanisms for identifying and exporting data (e.g., characters, text, numbers, etc.) at specific locations in a document stored in a data file are described herein. For example, a data file analyzer in accordance with some aspects described herein may identify and/or define a detection area that represents a portion of a document or page thereof in a data file for data extraction. In this example, the data file analyzer may use functionality that processes binary data of the data file representing a document portion indicated by the detection area such that the binary data is converted, derived, or decoded into human-readable data (e.g., text and/or numbers depicted when viewing the document portion in a PDF viewer application).

In accordance with some aspects of the subject matter described herein, techniques, methods, or mechanisms are described herein for identifying and/or defining a detection area using a reference point identifier, an offset value, and size information for indicating a size of the detection area. For example, a data file analyzer in accordance with some aspects described herein may identify or locate a reference point (e.g., the location of a predetermined phrase, such as "Salaries and wages") in a digital

document and may then move an amount of pixels to the right of the reference point based on a predetermined offset value and may extract or read data within the detection area (e.g., a 20 pixel wide and 5 pixel high rectangle or box) as indicated by predetermined size information.

5 Advantageously, in accordance with some aspects of the subject matter described herein, by using reference points and/or offset values to identify detection areas for data extraction, data extraction from a data file can be more flexible. For example, by searching for a keyword in a PDF document and then using offset values from the keyword to identify an area
10 for data extraction, an exact location (e.g., x- and y-coordinates) for data extraction does not needed to be known beforehand and, as such, similar but different forms can be processed. Further, by using functionality that can process a PDF file and extract (e.g., obtain, convert, derive, or decode) human-readable data (e.g., text, numbers, etc.) from binary data (e.g., non-
15 human-readable data or file data) of the PDF file, data extraction can be more reliable than other techniques, such as image analysis or optical character recognition (OCR) techniques. For example, instead of recognizing what a character is based on an image analysis, aspects described herein can perform data analysis on binary data in a data file
20 which can accurately and reliably identify the character since the binary data stores a representation of the character using a known data format, e.g., based on PDF specifications.

Reference will now be made in detail to various embodiments of the subject matter described herein, examples of which are illustrated in the
25 accompanying drawings. Wherever possible, the same reference numbers will be used throughout the drawings to refer to the same or like parts.

Figure 1 is a diagram illustrating a computing environment **100** according to an embodiment of the subject matter described herein. Computing environment **100** may include one or more computing platforms
30 and/or devices and/or entities associated with interacting with one or more data files, such as PDF files. Computing environment **100** may include one or more user(s) **102**, a PDF file **104**, and a data file analyzer **106**.

User(s) **102** may be any suitable entity (e.g., an automated system or a device or system controlled or controllable by a human user) for configuring and/or using data file analyzer **106** and/or related functions. For example, various user interfaces (e.g., an application user interface (API) and a graphical user interface (GUI)) may be provided for specifying, defining, or implementing rules or mapping information for identifying documents in PDF file **104** and/or for extracting or obtaining data from PDF file **104**. Exemplary user interfaces for configuring and/or using data file analyzer **106** may support automation (e.g., via one or more scripting languages) and may include a representation state transfer (REST) API, a command line, and/or a web based GUI.

In some embodiments, user(s) **102** may include a provisioning user, a system operator, or a service operator. For example, user(s) **102** may be a programmer, an administrator, or another entity that provisions data file analyzer **106** with information for performing data extraction and/or other data analysis functions. In this example, user(s) **102** may provide predetermined information (e.g., mapping information for identifying documents and detection areas) about a plurality of documents that may be represented, stored, or depicted (e.g., as binary data) in a PDF file.

PDF file **104** may represent any data file containing information stored using a PDF format or another data format (e.g., PostScript or extensible markup language (XML) Paper Specification) usable for storing one or more documents. For example, PDF file **104** may store data that represents a complete description of one or more documents, including text, fonts, graphics, and other information needed to display these documents. In this example, PDF file **104** may store the documents as binary data, e.g., non-human-readable data or file data. Continuing with this example, while a PDF reader application can display documents stored in PDF file **104**, data file analyzer **106** and/or related functionality may be required to extract or obtain human-readable data (e.g., text, numbers, etc.) from the binary data of PDF file **104**.

Data file analyzer **106** may represent any suitable entity (e.g., a processor executing software) for performing aspects associated with data

analysis, file analysis, document analysis, and/or data extraction (e.g., any method for obtaining data stored in PDF file **104**).

In some embodiments, data file analyzer **106** may include functionality for receiving and processing one or more data files. For example, data file analyzer **106** may provide a user interface to allow a user to upload one or more PDF files associated with a business, an individual, or a married couple. In this example, data file analyzer **106** may then utilize one or more algorithms for analyzing and/or extracting data from the uploaded PDF files.

In some embodiments, data file analyzer **106** may include functionality for identifying various documents and/or pages stored in PDF file **104**. In some embodiments, data file analyzer **106** may include functionality for extracting and/or obtaining data stored in PDF file **104**. For example, data file analyzer **106** may use predetermined mapping information associated with an identified document or page thereof to extract or obtain data stored in PDF file **104**. In this example, the predetermined mapping information is usable for identifying and/or defining detection areas (e.g., defined areas or portions of a document or a page thereof) in PDF file **104**.

Data file analyzer **106** may include and/or access data storage **112**. Data storage **112** may represent any suitable entity (e.g., a non-transitory computer readable medium, embedded memory, or a memory device) for storing data associated with extracting data from PDF file **104** and/or other data files. Data storage **112** may store software and/or logic associated with one or more algorithms associated with various aspects or functionality described herein. Data storage **112** may also store associations between document identifiers and mapping information for identifying and/or defining detection areas. Data storage **112** may include data obtained from PDF file **104** in one or more data structures, such as associative arrays, hash maps, linked lists, and/or data stores.

In some embodiments, data file analyzer **106** may include one or more algorithms (e.g., software and/or logic) that perform various aspects or functions. For example, data file analyzer **106** may include an identification algorithm **108** for identifying document or related identifiers and an extraction

algorithm **110** for extracting texts from detection areas in PDF file **104**. In this example, identification algorithm **108** may be used in conjunction with extraction algorithm **110** when performing data analysis and/or data extraction. In some embodiments, data storage **112** may be accessible by data file analyzer **106**, identification algorithm **108**, extraction algorithm **110**, and/or other entities. In some embodiments, data storage **112** may be located on a single device or computing platform or may be distributed across multiple devices or computing platforms.

Identification algorithm **108** may represent software and/or logic for identifying one or more documents or pages in PDF file **104**. In some embodiments, identification algorithm **108** may be configured to search and/or analyze PDF file **104** for different documents. For example, assuming PDF file **104** contains multiple tax forms or other documents, identification algorithm **108** may identify document boundaries (e.g., starting and ending page numbers) for each document. In this example, identification algorithm **108** may use extraction algorithm **110** or related functionality for identifying each of the documents, e.g., by searching each page for document identifiers.

In some embodiments, identification algorithm **108** may use predetermined or known information for identifying document identifiers. For example, identification algorithm **108** may access a data store of known identifiers, such as tax form numbers or a tax form year numbers, and identification algorithm **108** may be configured to search a top middle portion or a bottom left portion of each page in PDF file **104** for one or more of these identifiers. In another example, identification algorithm **108** may be configured to search metadata (e.g., file properties) associated with PDF file **104** for particular known identifiers, such as a PDF file producer application identifier, e.g., a name of a tax and/or accounting software package that generates PDF file **104**.

Extraction algorithm **110** may represent software and/or logic for extracting or obtaining data stored in PDF file **104**. In some embodiments, extraction algorithm **110** may be configured to identify and/or define one or more detection areas in a document or page thereof in PDF file **104**. For

example, extraction algorithm **110** may use predetermined mapping information to locate and/or define a detection area (e.g., a virtual geometric shape) containing a data field (e.g., text or numbers associated with a label, line number, or other data identifier) in an Internal Revenue Service (IRS) Form 1040 in PDF file **104**. In this example, extraction algorithm **110** may identify and/or define a detection area by identifying one or more reference points in the document, e.g., by searching for reference point identifiers, such as a line number, a label, a number, or one or more characters, in the document. Once the one or more reference points are identified, extraction algorithm **110** may discern or identify the top left corner of the detection area by adding any known offset values to x- and/or y-coordinate values associated with the one or more reference points. Continuing with this example, after discerning or identifying the top left corner of the detection area, extraction algorithm **110** may further define the detection area using predetermined height and width values and may then extract data within the defined detection area.

In some embodiments, extraction algorithm **110** may include functionality for processing binary data (e.g., data formatted according to a PDF specification) of PDF file **104** representing a document portion indicated by a detection area such that extraction algorithm **110** can identify, discern, decode, or convert the binary data into the human-readable data (e.g., text and/or numbers) that it represents.

In some embodiments, extraction algorithm **110** may communicate with another entity (e.g., a module, a software library, or separate logic) for extracting data from PDF file **104**. For example, extraction algorithm **110** may be configured to send coordinates representing a detection area to a PDF file reader (and/or a related API). In this example, the PDF file reader may identify and interpret binary data of PDF file **104** representing a document portion indicated by the coordinates and may return human-readable data associated with the document portion.

In some embodiments, data file analyzer **106**, identification algorithm **108**, and/or extraction algorithm **110** may filter, parse, and/or modify extracted or obtained data from PDF file **104**. For example, after extracting

data (e.g., 'A.3621.')

from a detection area, extraction algorithm **110** may be configured to identify a label, a number, a letter, or other data identifier (e.g., 'A') for a portion of the extracted data and may use the identifier to store the data portion adjacent to the identifier (e.g., '3621.')

in an appropriate data structure in data storage **112**.

It will be appreciated that Figure 1 is for illustrative purposes and that various nodes, their locations, and/or their functions (e.g., modules or algorithms) described above in relation to Figure 1 may be changed, altered, added, or removed. For example, some nodes, algorithms, and/or functions may be combined into a single entity. In another example, some nodes, algorithms, and/or functions may be distributed across multiple nodes and/or platforms.

Figure 2 is a diagram illustrating data **200** associated with extracting data from PDF file **104** according to an embodiment of the subject matter described herein. Data **200** may represent any information associated with extracting or obtaining data in PDF file **104** and/or for identifying a document in PDF file **104**. In some embodiments, data **200** may be accessed and/or stored by user(s) **102**, data file analyzer **106**, identification algorithm **108**, and/or extraction algorithm **110**. In some embodiments, data **200** may be stored in data storage **112** using various data structures.

In some embodiments, data **200** may be usable for uniquely identifying a document in PDF file **104**. For example, data **200** may include document identifiers (phrases, values, keywords, text, etc.) and data identifiers (e.g., line numbers, field descriptors, or labels). In this example, mapping information for identifying one or more detection areas in a document may be indexed using one or more document identifiers and/or one or more data identifiers.

In some embodiments, data **200** may be usable for identifying and/or defining detection areas. For example, data **200** may include various character strings (e.g., reference point identifiers) for identifying x- and y-coordinates of reference points in documents or pages thereof, offset values for offsetting x- and/or y-coordinates of reference points for indicating

detection area locations, and/or detection area dimensions (e.g., height and width values) for defining detection areas in the documents or pages thereof.

In some embodiments, data **200** may be updated periodically. For example, as tax forms or other documents are updated or changed, information associated with extracting or obtaining data from such documents may be updated or changed. In this example, data **200** may be modified yearly or semi-yearly so as to accurately identify, detect, and/or extract data from current and/or future tax forms or other documents.

Referring to Figure 2, data **200** may be depicted using a table where each row represents mapping information for identifying and/or defining a particular detection area in a particular document. For example, each row may comprise columns and/or fields for uniquely identifying a document and data of interest therein (e.g., a Form ID, a Schedule ID, a document year, a line ID, and a vendor ID) and columns and/or fields for defining a detection area in the document (e.g., a 'y' string ID, an 'x' string ID, an 'x' offset value, a 'y' minimum value, an 'x' minimum value, a 'y' offset value, a height value, a width value, and a page offset value).

An 'ID' field may comprise a value, a name, and/or a related identifier for indicating a particular set (e.g., row) of information usable for extraction, identification, or detection of particular data of interest. For example, an 'ID' field value may include a unique number or name, such as '1', '2', and '3'. In another example, an 'ID' field value may be hierarchical and may include a first portion that represents a document and a second portion that represents a unique data portion (e.g., a line number) in the document, e.g., 'DOC1-1a', 'DOC1-1b', and 'DOC1-2'.

A 'Form' field may comprise a value, a name, and/or a related identifier for indicating a particular document or template. For example, a 'Form' field value may represent an IRS tax form, such as '1065', '1098', '8825', 'W-2', 'W-4', or '1040'.

A 'Sched' field may comprise a value, a name, and/or a related identifier for indicating a particular schedule or a distinct portion of a document or template. For example, a 'Sched' field value may represent an IRS Schedule document or form, such as 'K-1'.

A 'Year' field may comprise a date, a number, and/or a related identifier for indicating a year or a date associated with a document. For example, a 'Year' field value may represent a year associated with an IRS tax form, such as '2013', '2014', or '2015'.

5 A 'Line' field may comprise a value, a name, and/or a related identifier for indicating a particular data of interest. For example, a 'Line' field value may represent a label or a line number in an IRS tax form, such as '1', '2a', or '2b'.

10 A 'Ystr' field may comprise a value and/or a related identifier for indicating a character string that indicates a y-coordinate for a reference point in a document. For example, a 'Ystr' field value may represent a phrase or a word that is unique in an IRS tax form. In this example, assuming a 'Ystr' field value is found in a document with pixels coordinates of (80, **125**), a reference point for the document may be associated with a y-coordinate of '125' pixels.

15 An 'Xstr' field may comprise a value, and/or a related identifier for indicating a character string that indicates an x-coordinate for a reference point in a document. For example, an 'Xstr' field value may represent a phrase or a word that is unique in an IRS tax form. In this example, assuming an 'Xstr' field value is found in a document with pixels coordinates of (20, **185**), a reference point for the document may be associated with an x-coordinate of '20' pixels.

20 An 'Xoff' field may comprise a value, a number, and/or a related identifier for indicating an offset from the x-coordinate of a reference point. For example, an 'Xoff' field value may indicate a number of pixels to offset or adjust the x-coordinate of a reference point for a first page of PDF file **104**. In this example, the 'Xoff' field value may be used to identify the x-coordinate value of the top left corner of a detection area on the first page by adding the 'Xoff' field value and the X-coordinate value of the reference point on the first page. In some embodiments, an 'Xoff' field value may be in pixels, inches, millimeters, or another unit of measurement.

30 A 'Ymin' field may comprise a value, a number, and/or a related identifier for indicating a minimum value for which the y-coordinate of a

reference point can be found. For example, a page in PDF file **104** may include a 'Ystr' field value in multiple locations. In this example, extraction algorithm **110** may ignore any instance of the 'Ystr' field value located on the page where the y-coordinate of the instance is less than a corresponding
5 'Ymin' field value. In some embodiments, a 'Ymin' field value may be in pixels, inches, millimeters, or another unit of measurement.

An 'Xmin' field may comprise a value, a number, and/or a related identifier for indicating a minimum value for which the x-coordinate of a reference point can be found. For example, a page in PDF file **104** may
10 include an 'Xstr' field value in multiple locations. In this example, extraction algorithm **110** may ignore any instance of the 'Xstr' field value located on the page where the x-coordinate of the instance is less than a corresponding 'Xmin' field value. In some embodiments, an 'Xmin' field value may be in pixels, inches, millimeters, or another unit of measurement.

15 A 'Yoff' field may comprise a value, a number, and/or a related identifier for indicating an offset from the y-coordinate of a reference point. For example, a 'Yoff' field value may indicate a number of pixels from the y-coordinate of a reference point for a first page of PDF file **104**. In this example, the 'Yoff' field value may be used to identify the y-coordinate value
20 of the top left corner of a detection area on the first page by adding the 'Yoff' field value and the y-coordinate value of the reference point on the first page. In some embodiments, a 'Yoff' field value may be in pixels, inches, millimeters, or another unit of measurement.

An 'HT' field may comprise a value, a number, and/or a related
25 identifier for indicating a height of a detection area. For example, an 'HT' field value may indicate that a detection area is to extend '100' pixels below a defined top left corner. In some embodiments, an 'HT' field value may be in pixels, inches, millimeters, or another unit of measurement.

A 'WDTH' field may comprise a value, a number, and/or a related
30 identifier for indicating a width of a detection area. For example, a 'WDTH' field value may indicate that a detection area is to extend '120' pixels right from a defined top left corner. In some embodiments, a 'WDTH' field value may be in pixels, inches, millimeters, or another unit of measurement.

A 'Pgoff' field may comprise a value, a number, and/or a related identifier for indicating an offset associated with a page of a document. In some embodiments, a 'Pgoff' field value may affect other offset values associated with a given data of interest. For example, when determining
5 where a reference point is on a page, extraction algorithm **110** may add the page offset and the y-coordinate offset together. In some embodiments, a 'Pgoff' field value may be in pixels, inches, millimeters, or another unit of measurement.

A 'Vend' field may comprise a value, a name, and/or a related
10 identifier for indicating a PDF producer application that generates PDF file **104**. In some embodiments, a 'Vend' field value may indicate that mapping information is associated with a particular IRS tax form generated by a particular tax software and/or accounting program.

It will also be appreciated that data **200** is for illustrative purposes and
15 that additional and/or different data than depicted in Figure 2 may be usable for extracting or obtaining data from a data file (e.g., PDF file **104**) or for identifying a document in a data file (e.g., PDF file **104**). Further, data **200** may be stored or managed using various data structures and/or computer readable media. Further, some data **200** may be stored in separate and/or
20 different locations.

Figure 3 is a diagram illustrating a detection area **308** associated with an IRS Form 1065 **300** according to an embodiment of the subject matter described herein. In some embodiments, data file analyzer **106**, identification algorithm **108**, and/or extraction algorithm **110** may utilize detection areas for
25 extracting data from various lines or fields of IRS Form 1065 **300**. For example, IRS Form 1065 **300** may represent a tax document for reporting partnership income.

Referring to Figure 3, various portions of IRS Form 1065 **300** for defining and/or identifying detection area **308** are depicted. Portion **302** may
30 represent a character string associated with a 'Ystr' field value and may indicate the y-coordinate for a reference point usable to locate or define detection area **308**. For example, extraction algorithm **110** may be configured to search and/or analyze IRS Form 1065 **300** for a character

string associated with a 'Ystr' field value and may store the y-coordinate where the character string is located in IRS Form 1065 **300**. In this example, after identifying a y-coordinate associated with the character string, extraction algorithm **110** may search and/or identify additional portions, such as portion **304** and portion **306**, using data **200**.

Portion **304** may represent a character string associated with an 'Xstr' field value and may indicate the x-coordinate for a reference point usable to locate or define detection area **308**. For example, after locating a y-coordinate for a reference point in IRS Form 1065 **300**, extraction algorithm **110** may be configured to search and/or analyze IRS Form 1065 **300** for a character string associated with an 'Xstr' field value and may store an x-coordinate where the character string is located in IRS Form 1065 **300**. In this example, after identifying the x-coordinate associated with the character string, extraction algorithm **110** may adjust the x-coordinate and/or the y-coordinate using one or more offset values.

Portion **306** may represent a top left corner of detection area **308** in IRS Form 1065 **300**. Portion **306** may be determined by adding an x-coordinate offset value (e.g., an 'Xoff' field value) to a previous identified x-coordinate of a reference point and by adding a y-coordinate offset value (e.g., a 'Yoff' field value) to a previous identified y-coordinate of a reference point. For example, assuming an 'x' offset value is '5' pixels and an x-coordinate for an x-coordinate related reference point is '120' pixels and assuming an 'y' offset value is '0' pixels and a y-coordinate for a y-coordinate related reference point is '80' pixels, the top left corner of detection area may be located at (125, 80), e.g., an x-coordinate of '125' pixels and a y-coordinate of '80' pixels.

Detection area **308** may represent a portion of IRS Form 1065 **300** for data extraction. In some embodiments, detection area **308** may be defined using x- and y-coordinates for the top left corner of detection area **308** and height and width values (e.g., a 'HT' field value and a 'WDTH' field value). For example, assuming that a top left corner of detection area **308** is located at (125, 80) and that detection area **308** is to be 3 pixels in height and 10

pixel in width, a bottom right corner of detection area **308** may be located at (135,83)

As depicted in Figure 3, detection area **308** may represent a rectangle-shaped portion of IRS Form 1065 **300** defined by using page related coordinates (e.g., x- and y- coordinates indicating a top left corner of a detection area) and/or size information. In this example, data file analyzer **106**, identification algorithm **108**, and/or extraction algorithm **110** may request that a PDF related API extract data located within the detection area and the PDF related API may provide the extracted data, e.g., by identifying and/or converting relevant binary code or data of PDF file **104** into human-readable characters (e.g., text and/or values).

In some embodiment, detection area **308** may represent a virtual box or other virtual shape defined using predetermined mapping information, e.g., detection area **308** is not depicted, drawn, or visually represented in PDF file **104**. Further, while detection area **308** may include a physical (e.g., a depicted or drawn) rectangle comprising four black lines or other depicted boundaries in IRS form **1065**, extraction algorithm **110** may avoid using image analysis to identify these depicted boundaries or detection area **308**. Instead of performing image analysis on a digital document for identifying detection area **308**, extraction algorithm **110** may use predetermined mapping information to identify a document related reference point and may then use predetermined offset values and the document related reference point for indicating a location for detection area **308** and may also use predetermined size information for defining the size (e.g., dimensions) of detection area **308**.

In some embodiments, detection areas and/or characteristics thereof (e.g., usage, size, shape, location, etc.) may be predefined or predetermined. For example, prior to data file analyzer **106** receiving PDF file **104**, data file analyzer **106** may have access to a data store containing information for defining detection areas for numerous documents. In this example, data file analyzer **106** or a related entity (e.g., extraction algorithm **110**) may attempt to identify a document by inspecting pages of PDF file **104** for one or more known or predetermined document identifiers. Continuing

with this example, once a document is identified, data file analyzer **106** or a related entity (e.g., extraction algorithm **110**) may access and use relevant information in the data storage in defining detection area **308** for data extraction.

5 In some embodiments, detection areas and/or characteristics thereof may be dynamic. For example, when analyzing a digital page of PDF file **104**, data file analyzer **106** may be unaware of where document identifiers or data of interest are located on the page. In this example, data file analyzer **106** or a related entity (e.g., extraction algorithm **110**) may attempt to identify
10 a title, a tax form name, a tax form year number and/or another document identifier by dynamically defining a detection area that encompasses the whole page, extracting data from within the detection area, and analyzing the extracted data for identifying known identifiers (e.g., keywords, numbers, or other information). In another example, data file analyzer **106** or a related
15 entity (e.g., extraction algorithm **110**) may dynamically define a detection area (e.g., change location or size of detection area) based on previous extracted data and/or expected content.

 It will be appreciated that Figure 3 is for illustrative purposes and that additional and/or different data than that depicted in Figure 3 may be usable
20 for defining detection areas.

 Figure 4 is a diagram illustrating multiple detection areas **402** and **404** associated with an IRS Schedule K-1 document **400** according to an embodiment of the subject matter described herein. In some embodiments, data file analyzer **106**, identification algorithm **108**, and/or extraction
25 algorithm **110** may utilize detection areas for extracting data from various lines or fields of IRS Schedule K-1 document **400**. For example, IRS Schedule K-1 document **400** may represent a tax document for an S corporation. In this example, Schedule K-1 document **400** may report each shareholder's share of income, deductions, losses, and credits.

30 Referring to Figure 4, IRS Schedule K-1 document **400** may include detection area **402** and detection area **404**. Detection area **402** may identify a portion of Schedule K-1 document **400** usable for reporting line '12 Other Deductions' information and detection area **404** may identify a portion of

Schedule K-1 document **400** usable for reporting line '16 Items affecting shareholder basis' information.

In some embodiments, where detection area **402** and detection area **404** include numerous values or character strings, data file analyzer **106**,
5 identification algorithm **108**, and/or extraction algorithm **110** may utilize various logic or techniques for parsing or separating each value or character strings before storing or using the extracted data.

It will be appreciated that Figure 4 is for illustrative purposes and that additional and/or different detection areas may be used for extracting data
10 from IRS Schedule K-1 document **400**.

Figure 5 is a diagram illustrating a conditional detection area **506** associated with an IRS Schedule K-1 document **500** according to an embodiment of the subject matter described herein. In some embodiments, data file analyzer **106**, identification algorithm **108**, and/or extraction
15 algorithm **110** may utilize detection areas for extracting data from various lines or fields of IRS Schedule K-1 document **500**.

In some embodiments, a detection area and/or characteristics thereof (e.g., usage, size, shape, location, etc.) may be utilized or not utilized depending on a variety of factors and/or conditions. Some factors and/or
20 conditions that can affect a detection area or usage thereof may include document related information (e.g., type of tax form, year of tax form, etc.) and/or previously extracted data. For example, if extracted data from an IRS Form 1040 indicates that the IRS Form 1040 includes itemized deductions, extraction algorithm **110** may define and use detection areas for extracting
25 the itemized deductions from the IRS Form 1040.

Referring to Figure 5, IRS Schedule K-1 document **500** may include detection areas **502**, **504**, and **506**. Each of detection areas **502** and **504** may represent an unconditional or default detection area. For example, an unconditional or default detection area may be a detection area that is
30 defined and/or used (e.g., by extraction algorithm **110**) for extracting mandatory data from a given document. In this example, extraction algorithm **110** may utilize unconditional or default detection areas, such as detection

areas **502** and **504**, for extracting data in locations of IRS Schedule K-1 document **500** that are mandatory or that are generally not left blank.

Detection area **506** may represent a conditional detection area that may be defined and/or used (e.g., by extraction algorithm **110**) only if certain conditions are met. In some embodiments, conditional detection areas, such as detection area **506**, may be defined for extracting data in locations of IRS Schedule K-1 document **500** that are optional or that may be left blank. For example, extraction algorithm **110** may utilize a conditional detection area, such as detection area **506**, if data extracted from detection areas **502** and/or **504** indicates that data of interest exists within conditional detection area **506** of IRS Schedule K-1 document **500**.

It will be appreciated that Figure 5 is for illustrative purposes and that additional and/or different factors and/or conditions than those depicted in Figure 5 may be usable for defining conditional detection areas.

Figure 6 is a diagram illustrating log data **600** associated with extracting data from PDF file **104** according to an embodiment of the subject matter described herein. In some embodiments, data file analyzer **106**, identification algorithm **108**, extraction algorithm **110**, and/or another module or algorithm may store log data **600** for testing, validation, and/or other purposes.

In some embodiments, log data **600** may be maintained or stored for each PDF file **104** and/or each document therein. For example, as depicted in Figure 6, a log file may store log data **600** for an IRS Schedule K-1 document. In this example, the log file may store various attributes or information about a detection area, a line number, and/or a data field associated with the IRS schedule K-1 document.

In some embodiments, log file **600** may include multiple data entries, such as data entry **602**. Data entry **602** may represent particular data of interest that has been extracted from a document stored in PDF file **104** by extraction algorithm **110**. Data entry **602** may indicate the document name or document type and the data field or line that was extracted (e.g., 'the value for sched K1, line 13a'), coordinates (e.g., in pixels) of the top left corner for a detection area (e.g., 'x/y 299/238') and size information indicating a height

and width (e.g., in pixels) for the detection area (e.g., 'h/w 50/130'). Continuing with the example, data entry **602** may indicate actual data extracted from the detection area (e.g., 'A **331**. B **331**.'), along with the data that is stored which may be a modified or filtered version of the extracted data (e.g., 'A **331**.').

In some embodiments, log data **600** and/or data entry **602** may be usable for identifying invalid data and may be usable for flagging the invalid data or notifying user(s) **102** or another relevant entity (e.g., a service operator). In some embodiments, log data **600** and/or data entry **602** may be usable for determining an appropriate height and width of the detection area and/or appropriate location triggers (e.g., reference point identifiers and/or offset values) for accurately and reliably obtaining particular data of interest.

It will also be appreciated that log data **600** is for illustrative purposes and that additional and/or different data than log data **600** may be usable for testing, validation, and/or other purposes. Further, data **600** may be stored or managed using various data structures and/or computer readable media. Further, some data **600** may be stored in separate and/or different locations.

Figure 7 is a diagram illustrating a graphical user interface (GUI) **700** for interacting with extracted data according to an embodiment of the subject matter described herein. In some embodiments, data file analyzer **106**, and/or an associated module, algorithm or node may generate and/or provide GUI **700** for providing, receiving, displaying, and/or interacting with extracted data from PDF file **104** or another data file. In some embodiments, GUI **700** may include a web based interface, e.g., a web page presented to user(s) **102** via a web browser application.

GUI **700** may represent any suitable user interface (UI) container or UI window for displaying or providing content to user(s) **102**. In some embodiments, GUI **700** may include UI elements for displaying and/or modifying extracted data from PDF file **104**. For example, data file analyzer **106** may use extraction algorithm **110** to obtain or extract data from one or more documents stored in PDF file **104**. In this example, data file analyzer **106** may utilize GUI **700** for displaying the extracted data and/or for allowing changes to the extracted by user(s) **102**.

In some embodiments, GUI **700** may depict a digital version of a document. For example, as depicted in Figure 7, GUI **700** may include labels, descriptions, and text boxes containing values from an IRS Form 1040 stored in PDF file **104**. In this example, each text box may contain
5 extracted data and may be editable by user(s) **102**. For example, GUI **700** may represent a digital version of an IRS Form 1040 with extracted values for different line items. In this example, GUI **700** may include a text box representing a value from line '7' of an IRS Form 1040 with a description of 'Wages, salaries, tip, etc. Attach Form(s) W-2' and a text box representing a
10 value from line '8a' of an IRS Form 1040 with a description of 'Taxable Interest. Attach Schedule B if required' among others.

In some embodiments, GUI **700** may include UI elements for indicating that extracted data may be invalid or need further review. For example, as depicted in Figure 7, an arrow, text and/or a symbol (e.g., '!' or
15 '?') may be display near a text box to indicate that data in the text box is invalid or that user(s) **102** may need to review and/or update the text box.

It will be appreciated that Figure 7 is for illustrative purposes and that additional and/or different UI elements than those depicted in Figure 7 may be usable for displaying and/or interacting with extracted data from PDF file
20 **104**.

Figure 8 is a diagram illustrating a process **800** for extracting data from a PDF file according to an embodiment of the subject matter described herein. In some embodiments, process **800**, or portions thereof (e.g., steps
25 **802**, **804**, **806**, **808**, and/or **810**), may be performed by or at data file analyzer **106**, identification algorithm **108**, extraction algorithm **110**, and/or another node or module.

Referring to process **800**, in step **802**, at least one document identifier may be identified for a first document in PDF file **104**. For example, data file analyzer **106** may analyze each page of PDF file **104** and may attempt to
30 identify a document identifier or a group of document identifiers that uniquely identify a document.

In some embodiments, identifying at least one document identifier may include searching the first document for the at least one document

identifier in predetermined or dynamic locations. For example, data file analyzer **106** may be configured to search a given page or certain portions (e.g., top-middle, left-bottom, etc.) of the page for keywords, phrases, images, page layouts, and/or certain fonts that represent or indicate at least one document identifier.

In some embodiments, a document (e.g., in PDF file **104**) may include a financial statement, a financial report, semi-contained content, tabular data, a tax form, an IRS Form 1040, an IRS Form 8825, an IRS Form 1099, an IRS Form 1098, an IRS Form W-2, an IRS Form W-4, or an IRS Form 1065.

In some embodiments, at least one document identifier for identifying a document or form in a PDF file may include a form identifier, a publication year, a document vendor, and/or a PDF producer application identifier associated with the PDF file. For example, data file analyzer **106** may attempt to detect whether a page in PDF file **104** includes a form identifier (e.g., search for the phrase 'W-2' in a particular area of the page) and a form year (e.g., search for the number '2015' within a certain area of the page) and/or may search a metadata field associated with PDF file **104** for identifying a PDF producer application identifier (e.g., 'PDF-MAKER3000', 'PDF-MAKER2000', or 'TAXPROF-X').

In step **804**, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information (e.g., height and width values) for indicating a size of the first detection area in the first document may be determined using the at least one document identifier.

In some embodiments, a reference point identifier may include a predetermined character string in the document. For example, a reference point identifier may indicate a phrase, a word, or a label for indicating a reference point in a document.

In some embodiments, a reference point identifier may include a predetermined location in the document. For example, a reference point identifier may indicate x- and y-coordinates or other information for indicating a reference point in a document.

In some embodiments, e.g., where a word or phrase is repeated in a document, a reference point may be determined or identified by using a predetermined character string (e.g., a reference point identifier) and search location information (e.g., minimum values for x- and y-coordinates for
5 indicating where in a document to search for the predetermined character string).

In step **806**, the reference point in the first document may be identified using the reference point identifier. For example, extraction algorithm **110** may search a page in PDF file **104** for a predetermined character string and
10 the location of the character string on the page (e.g., x- and y-coordinates associated with the location of the predetermined character string on the page) may be the reference point. In another example, extraction algorithm **110** may search a page in PDF file **104** for two different character strings, where the location of the first character string on the page may indicate the
15 x-coordinate of the reference point and the location of the second character string on the page may indicate the y-coordinate of the reference point.

In step **808**, the first detection area in the first document may be identified using the offset value and the size information. For example, after identifying a reference point, extraction algorithm **110** may use a
20 predetermined offset value to determine a top left corner of detection area **308** (e.g., by adding the offset value to the x- or y-coordinate of the reference point). In this example, extraction algorithm **110** may use a predetermined width and height value to further define the location and dimensions of detection area **308**.

In step **810**, data within the first detection area of the first document may be extracted by processing binary data of the PDF file. For example, data file analyzer **106** may analyze and/or process binary data of PDF file
25 **104** representing the document or page portion within detection area **308**. In this example, data file analyzer **106** may process (e.g., translate, convert, interpret, decode, etc.) the binary data to obtain human-readable data
30 represented by the binary data processed.

In some embodiments, extracting data within a detection area of a document may be performed without using OCR or image analysis. For

example, instead of using OCR or image analysis to identify relevant text in a digital document, data file analyzer **106** may process binary data of PDF file **104** to obtain human-readable text represented by the binary data processed.

5 In some embodiments, extracting data within a detection area of a document may involve using a PDF file reader (and/or a related API) for identifying and interpreting binary data of PDF file **104**. For example, a PDF software library, such as iText, may include functionality for reading and/or interpreting binary data of PDF file **104**. In this example, data file analyzer
10 **106** may use the PDF software library (e.g., via an API) to identify the text stored within a particular area of a document (e.g., detection area **308**) in PDF file **104**.

 In some embodiments, PDF file **104** may include a second document associated with one or more detection areas for data extraction. For
15 example, PDF file **104** may include multiple IRS Schedule K-1 forms, each with multiple data fields containing data of interest. In this example, data file analyzer **106** may identify and extract the data of interest by defining a detection area for each of the relevant data fields of the IRS Schedule K-1 forms.

20 In some embodiments, data file analyzer **106** may store data (e.g., extracted from detection area **308** in a PDF file) in a data structure (e.g., in data storage **112**) based on at least one document identifier. For example, data file analyzer **106** may identify a particular data entry (e.g., row data from Figure 2) based on at least one document identifier (e.g., a Form
25 name, a Form year, and/or a document creator (e.g., PDF producer application)). In this example, the particular data entry may include information (e.g., a 'line' value) usable for indicating a data structure and/or a data field where extracted data is to be stored by data file analyzer **106**.

 In some embodiments, data file analyzer **106** may analyze data (e.g.,
30 extracted from detection area **308** in a PDF file) for invalid information and may notify user(s) **102** about the invalid information. For example, data file analyzer **106** may use a user interface to flag or otherwise indicate that

some data was not extracted and/or that extracted data appears to be invalid.

It will be appreciated that process **800** is for illustrative purposes and that different and/or additional actions may be used. It will also be appreciated that various actions described herein may occur in a different order or sequence.

It should be noted that data file analyzer **106** and/or functionality described herein may constitute a special purpose computing device. Further, data file analyzer **106** and/or functionality described herein can improve the technological field of data extraction from PDF files or other data files that store documents having tabular data and/or semi-constrained data. For example, by using a reference point and an offset value to identify a detection area for obtaining data of interest, data file analyzer **106** may identify and extract data from a PDF file containing different tax forms and/or variations of such forms, e.g., without needing the data in the PDF file to be rekeyed (e.g., manually entered) as required by some techniques or systems. Further, by obtaining human-readable data from binary data of a PDF file, such data extraction is more reliable and accurate than OCR related techniques that require image analysis to identify characters.

It will be understood that various details of the subject matter described herein may be changed without departing from the scope of the subject matter described herein. Furthermore, the foregoing description is for the purpose of illustration only, and not for the purpose of limitation, as the subject matter described herein is defined by the claims as group forth hereinafter.

CLAIMS

What is claimed is:

1. A method for extracting data from a portable document format (PDF) file, the method comprising:
 - 5 identifying at least one document identifier associated with a first document in a portable document format (PDF) file;
determining, using the at least one document identifier, a reference point identifier in the first document, an offset value for indicating a location of a first detection area in the first document, and
10 size information for indicating a size of the first detection area in the first document,
identifying, using the reference point identifier, the reference point in the first document;
identifying, using the offset value and the size information, the
15 first detection area in the first document; and
extracting, by processing binary data of the PDF file, data within the first detection area of the first document.
2. The method of claim 1 wherein extracting the data is performed without using optical character recognition (OCR).
- 20 3. The method of claim 1 wherein identifying at least one document identifier includes searching the first document for the at least one document identifier in predetermined or dynamic locations.
4. The method of claim 1 wherein extracting the data within the detection area of the first document includes using a PDF file reader
25 application programming interface (API) for identifying and interpreting binary data of the PDF file.
5. The method of claim 1 wherein the at least one document identifier includes a form identifier, a publication year, a document vendor, or a PDF producer application identifier associated with the PDF file.

6. The method of claim 1 wherein the PDF file includes a second document associated with one or more detection areas for data extraction.
7. The method of claim 1 wherein the reference point identifier includes a predetermined character string or a predetermined location in the first document.
8. The method of claim 1 comprising:
storing the data in a data structure based on the at least one document identifier.
9. The method of claim 1 comprising:
analyzing the data for invalid information; and
notifying a user about the invalid information.
10. The method of claim 1 wherein the first document includes a financial statement, a financial report, semi-contained content, tabular data, a tax form, an Internal Revenue Service (IRS) Form 1040, an IRS Form 8825, an IRS Form 1099, an IRS Form 1098, an IRS Form W-2, an IRS Form W-4, or an IRS Form 1065.
11. A system for extracting data from a portable document format (PDF) file, the system comprising:
a data file analyzer comprising:
at least one processor; and
a memory,
wherein the data file analyzer is configured to identify at least one document identifier associated with a first document in a portable document format (PDF) file, to determine, using the at least one document identifier, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information for indicating a size of the first detection area in the first document, to identify, using the reference point identifier, the

reference point in the first document, to identify, using the offset value and the size information, the first detection area in the first document, and to extract, by processing binary data of the PDF file, data within the first detection area of the first document.

- 5 12. The system of claim 11 wherein extracting the data is performed without using optical character recognition (OCR).
13. The system of claim 11 wherein the data file analyzer is configured to search the first document for the at least one document identifier in predetermined or dynamic locations.
- 10 14. The system of claim 11 wherein the data file analyzer is configured to extract the data within the detection area of the first document by using a PDF file reader application programming interface (API) for identifying and interpreting binary data of the PDF file.
- 15 15. The system of claim 11 wherein the at least one document identifier includes a form identifier, a publication year, a document vendor, or a PDF producer application identifier associated with the PDF file.
16. The system of claim 11 wherein the PDF file includes a second document associated with one or more detection areas for data extraction.
- 20 17. The system of claim 11 wherein the reference point identifier includes a predetermined character string or a predetermined location in the first document.
18. The system of claim 11 wherein the data file analyzer is configured to store the data in a data structure based on the at least one document
25 identifier.
19. The system of claim 11 wherein the data file analyzer is configured to analyze the data for invalid information and to notify a user about the invalid information.

20. The system of claim 11 wherein the first document includes a financial statement, a financial report, semi-contained content, tabular data, a tax form, an Internal Revenue Service (IRS) Form 1040, an IRS Form 8825, an IRS Form 1099, an IRS Form 1098, an IRS Form W-2, an IRS Form W-4, or an IRS Form 1065.
- 5
21. A computer readable medium having stored thereon computer-executable instructions that when executed by at least one processor of a computer cause the computer to perform steps comprising:
- 10 identifying at least one document identifier associated with a first document in a portable document format (PDF) file;
- determining, using the at least one document identifier, a reference point identifier for identifying a reference point in the first document, an offset value for indicating a location of a first detection area in the first document, and size information for indicating a size of
- 15 the first detection area in the first document,
- identifying, using the reference point identifier, the reference point in the first document;
- identifying, using the offset value and the size information, the first detection area in the first document; and
- 20 extracting, by processing binary data of the PDF file, data within the first detection area of the first document.

1/8

100

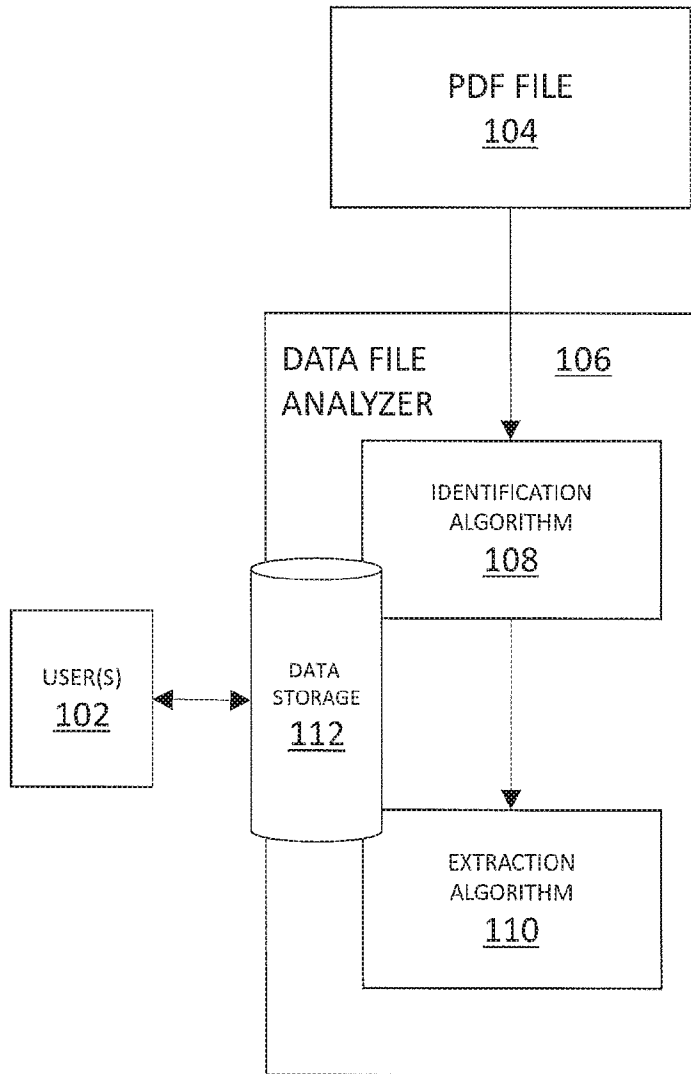


FIG. 1

200

ID	FORM	SCHED	YEAR	LINE	YSTR	XSTR	XOFF	YMIN	XMIN	YOFF	HT	WIDTH	PGOFF	VEND
100	1065	NULL	2013	1a	Gf...	1a	5	0	0	0	13	50	0	VEND1
116	1065	NULL	2014	1a	Gf...	1a	5	0	0	-1	15	52	0	VEND1
122	1065	NULL	2015	1a	Gf...	1a	5	0	0	0	15	52	0	VEND1
203	W-2	NULL	2014	1	Wa...	Wa...	3	0	0	0	3	15	15	VEND1
234	W-2	NULL	2015	1	Wa...	Wa...	5	0	0	0	5	5	0	VEND2
245	1040	NULL	2015	Status	Single	Single	-15	0	0	0	3	3	1	VEND3
356	W-4	NULL	2014	5	To...	To...	5	0	0	0	10	40	0	VEND1
407	W-4	NULL	2015	5	To...	To...	5	0	0	0	12	39	0	VEND1

FIG. 2

300

3/8

1065 U.S. Return of Partnership Income **304** **306**

Form 1065-0123
Department of the Treasury
Internal Revenue Service

For calendar year 2014, or tax year beginning _____, ending _____

A Principal business activity
Landscaping
Type of Principal product or service
Whitewater Landscaping
Number, street, and room or suite no. (if a P.O. box, see the instructions).
500 Amber Drive
City or town, state or province, county, and ZIP or foreign postal code
Whitewater WI 53190

B Business code number
236110

C Check applicable boxes:
(1) Initial return (2) Final return (3) Name change (4) Address change (5) Amended return
(6) Technical termination - also check (1) or (2)

D Check accounting method: (1) Cash (2) Accrual (3) Other (specify)

E Number of Schedules K-1. Attach one for each person who was a partner at any time during the tax year

F Check if Schedules C and M-3 are attached

D Employer identification number
22-8462552

E Date business started

F Total assets
\$ 1,980,289.

302 **Caution.** Include only trade or business income and expenses on lines 1a through 22 below. See the instructions for more information.

1 a Gross receipts or sales	1032566.	1a
b Returns and allowances	46524.	1b
c Balance. Subtract line 1b from line 1a	985942.	1c
2 Cost of goods sold (attach Form 1125-A)	13138.	2
3 Gross profit. Subtract line 2 from line 1c	20004.	3
4 Ordinary income (loss) from other partnerships, estates, and trusts (attach statement)	465.	4

308

FIG. 3

400

4/8

Yohan Werner 450 Herbert Way Raleigh, NC 27613		10	Other income (less)	15	Alternative min tax (AMT) items
F Shareholder's percentage of stock ownership for tax year 33.000000%		A		A	4907.
		B	107.	F*	stmt
		D	338.		
		E	151.		
		11	Section 179 deduction	16.	Items affecting shareholder basis
				A	287.
		12	Other deductions	B	284.
		A	3621.	C	2745.
		B	228.	D	495.
		C	88.		
		D	1642.	17	Other information
		E	33.	A	6030.
		F	2227.	B	1598.
		G	2160.	V*	stmt
		H	2134.		
		*	stmt		

404

402

11221 10-26-15 JWA For Paperwork Reduction Act Notice, see Instructions for Form 1120S. Schedule K-1 (Form 1120S) 2015
 IRS.gov/form 1120s
 *See attached statement for additional information.

FIG. 4

For IRS Use Only

500

Yohan Werner 450 Herbert Way Raleigh, NC 27613		10 Other income (loss)	15 Alternative min tax (AMT) items
F Shareholder's percentage of stock ownership for tax year 33.000000%		A 165.	A 4907.
		B 107.	F* Stmt
		D 338.	
		E 151.	
		11 Section 179 deduction 164.	16 Items affecting shareholder basis 287.
		A 3621.	B 284.
		B 228.	C 2745.
		C 88.	D 495.
		D 1642.	
		E 33.	17 Other information 6030.
		F 2227.	B 1598.
		G 2160.	V* Stmt
		H 2134.	
		* Stmt	

5/8

506

502

504

112051
10-26-15
JWA For Paperwork Reduction Act Notice, see Instructions for Form 1120S.
IRS.gov/Form1120S
Schedule K-1 (Form 1120S) 2015

FIG. 5

For IRS Use Only

600

the value for sched K1, line SSN using x/y 111/448, h/w 12/63 = 100-77-3895, saving 100-77-3895
 the value for sched K1, line Name using x/y 97/401, h/w 30/63 = Henry George, saving Henry George
 the value for sched K1, line L2 using x/y 267/157, h/w 12/63 = 6, 105.F, saving 6105.
 the value for sched K1, line L4 using x/y 267/133, h/w 12/63 = (590.) I, saving 590.
 the value for sched K1, line 4 using x/y 414/614, h/w 12/20 = 26.598., saving 26598.
 the value for sched K1, line 5 using x/y 414/590, h/w 12/20 = 264., saving 264.
 the value for sched K1, line 6a using x/y 414/566, h/w 12/20 = 132., saving 132.
 the value for sched K1, line 8 using x/y 414/494, h/w 12/20 = 33., saving 33.
 the value for sched K1, line 9a using x/y 414/470, h/w 12/20 = 36., saving 36.
 the value for sched K1, line 10 using x/y 414/398, h/w 12/20 = 46., saving 46.
 the value for sched K1, line 13a using x/y 299/238, h/w 50/130 = A 331.B 331., saving A 331.
 the value for sched K1, line 13b using x/y 414/248, h/w 12/20 = 331., saving 331.

602

FIG. 6

SAIWORKS CREDIT ANALYSIS WITH AG My Account Log Out

Add/Edit Activities Perform Analysis Reports Tools/Extras Support

Activities

Form 1040 Sched A Sched C Sched E1 Sched E11 Sched F 1065 K-1 1120S K-1 Finish Tax Entry

PERSONAL TAX RETURN
GRONK, ROB

Please enter the amounts in the boxes that correspond to the appropriate line numbers in the tax form. When you are done, click Save and Continue to proceed to the next schedule or click the desired schedule above. Please enter only amounts that are regular and recurring. Tip: Want a Calculator?

Form 1040

U.S. Individual Income Tax Return

2015

7 Wages, salaries, tips, etc. Attach Form(s) W-2	188,505
8a Taxable interest. Attach Schedule B if required	14,850
8b Tax-exempt interest. Do not include on line 8a	10,110
9a Ordinary dividends. Attach Schedule B if required	100
10 Taxable refunds, credits, or offsets of state and local income taxes	INVALID?
11 Alimony received	145
12 Business income or (loss). Attach Schedule C or C-EZ (Note: We do not use this line for cash flow purposes. Instead, we use the amount entered on the Schedule C)	-125,944
13 Capital gain or (loss). Attach Schedule D if required. (Note: If you are entering K-1's, Please enter the full amount from Line 13 on this line. O otherwise, enter regular and dependable amounts only)	-3,000
14 Other gains or (losses). Attach Form 4797 (enter regular and dependable amounts only)	14,500
15a IRA distributions (Note: If your form has only an amount under 15b, please input that full amount here. Exclude rollover amount(s))	98,654
16a Pensions and annuities (Note: If your form has only an amount under 16b, please input that full amount here)	0

FIG. 7

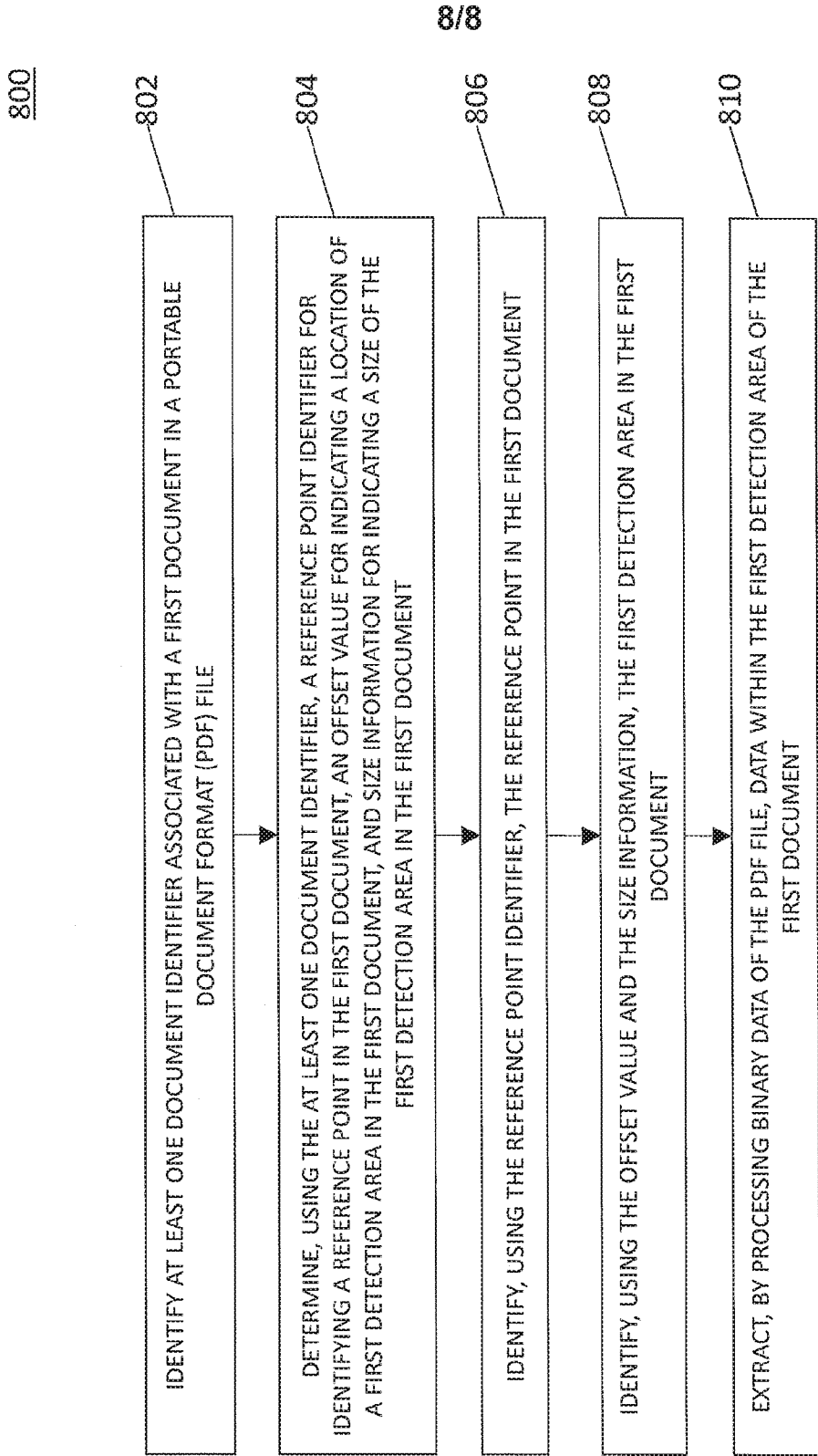


FIG. 8