
AUTOMATION ANYWHERE

IQ Bot Trial Quick Start Guide

Document Version	1.0
Date of Publication	23/10/2018
Update(s) to Document Edition	First Edition

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1 Introduction

IQ Bot is custom-built cognitive automation platform, which is designed to serve a specific business goal. You can train IQ Bot to automate and make business processes faster and efficient while simultaneously eliminating human error.

Use **IQ Bot** and **Automation Anywhere Enterprise** in conjunction to automate your business processes that rely on semi-structured or unstructured data hidden in electronic documents, images, emails, and other such areas. IQ Bot leverages computer vision and multiple AI techniques to intelligently digitize and extract data to make your Robotic Process Automation (RPA) and Optical Character recognition (OCR) technology even more effective.

Using this approach IQ Bot can adapt its data extraction from specific domains or document types, and quickly learn from the environment to improve the results.

For the trial version, five domains are available for use: 1) Invoices, 2) Purchase Orders, 3) Bank Statement, 4) Pay Stubs, and 5) Electricity Bills.

IQ Bot uses the OCR technology to extract information from a document. However, while OCR tools measure results based on accuracy, IQ Bot uses the Straight Through Processing (STP) technique to measure how many documents can be processed end-to-end without human intervention.

1.1 Advantages of IQ Bot

Compared to traditional OCR tools, IQ Bot has the following advantages:

- IQ Bot is Domain oriented
- IQ Bot learns from user data / inputs
- IQ Bot has pre-built domains (invoices, POs, Claims, and so on)
- IQ Bot organizes information to guide users to create the bots
- IQ Bot's staging mode improves results before production
- IQ Bot has higher STP

You can use IQ Bot in two steps:

1. Start training a learning instance that stores all the learning from that specific process.
2. Send this learning instance to production, that processes documents sent through Automation Anywhere Enterprise bots in a batch mode.

In the trial version, only the training mode is available.

2 Get started with IQ Bot

This section explains how to start using IQ Bot by providing instructions to process sample invoices.

To use the IQ Bot Trial site, you need to first register for the IQ Bot Trial, then login with credentials from the welcome email you receive.

On the IQ Bot Trial site, you can go through the training process and download CSV files of the documents used for training. The training process consists the following steps:

- Create a learning instance
- Select a domain
- Upload sample documents to the learning instance
- Train the learning instance based on the document analyzed by IQ Bot, and
- Export data to a CSV file

2.1 Registering as an IQ Bot User

To register as a new IQ Bot user on the IQ Bot Trial portal:

Click on the **Register** link to register as a new IQ Bot user.

You receive the login credentials and a link to the IQ Bot Portal URL in an email.

2.2 Prerequisites for using IQ Bot

- Ensure you have registered to the IQ Bot trial, received your credentials and have already watched the IQ Bot trial informational videos.
- Ensure you have unzipped the sample documents on your desktop.

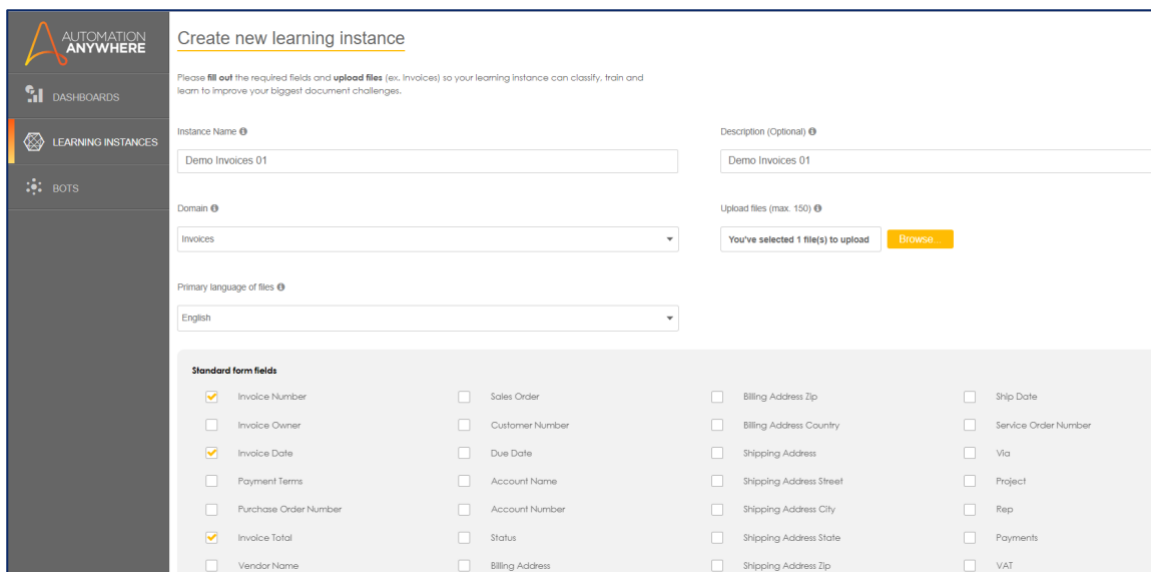
3 Creating a Learning Instance with English Invoices

You need to create a learning instance to get your learning instance trained from the different documents uploaded to your learning instance. For example, learning instance created for different types of invoice documents for banks, insurance companies, and pharmacies. Based on the training, accuracy of extracted data is improved.

NOTE: You can use different invoices in TIFF, JPEG, PNG, and PDF, and other format to train your learning instance.

To create a new learning instance with English Invoices:

1. Open the IQ Bot Portal.
2. Click **LEARNING INSTANCES > New Instance**.



Create new learning instance

Please fill out the required fields and upload files (ex. Invoices) so your learning instance can classify, train and learn to improve your biggest document challenges.

Instance Name

Description (Optional)

Domain

Upload files (max. 150) You've selected 1 file(s) to upload

Primary language of files

Standard form fields

<input checked="" type="checkbox"/> Invoice Number	<input type="checkbox"/> Sales Order	<input type="checkbox"/> Billing Address Zip	<input type="checkbox"/> Ship Date
<input type="checkbox"/> Invoice Owner	<input type="checkbox"/> Customer Number	<input type="checkbox"/> Billing Address Country	<input type="checkbox"/> Service Order Number
<input checked="" type="checkbox"/> Invoice Date	<input type="checkbox"/> Due Date	<input type="checkbox"/> Shipping Address	<input type="checkbox"/> Via
<input type="checkbox"/> Payment Terms	<input type="checkbox"/> Account Name	<input type="checkbox"/> Shipping Address Street	<input type="checkbox"/> Project
<input type="checkbox"/> Purchase Order Number	<input type="checkbox"/> Account Number	<input type="checkbox"/> Shipping Address City	<input type="checkbox"/> Rep
<input checked="" type="checkbox"/> Invoice Total	<input type="checkbox"/> Status	<input type="checkbox"/> Shipping Address State	<input type="checkbox"/> Payments
<input type="checkbox"/> Vendor Name	<input type="checkbox"/> Billing Address	<input type="checkbox"/> Shipping Address Zip	<input type="checkbox"/> VAT

3. Enter the following information:
 - **Instance name:** Type a name for the Instance. For example, enter *Demo Invoices 01*.
 - **Domain:** Select *Invoices*, that is, the domain for the documents you are going to upload.
 - **Primary language of files:** Select the language of the Instance from the drop-down list. For example, select *English* for uploading invoices in English.
 - **Description(optional):** Type a description for the Learning Instance.
 - **Upload files from:** Click the **Browse** button and select all the English Invoices from the folder where you had downloaded them on your desktop and click **Open**.

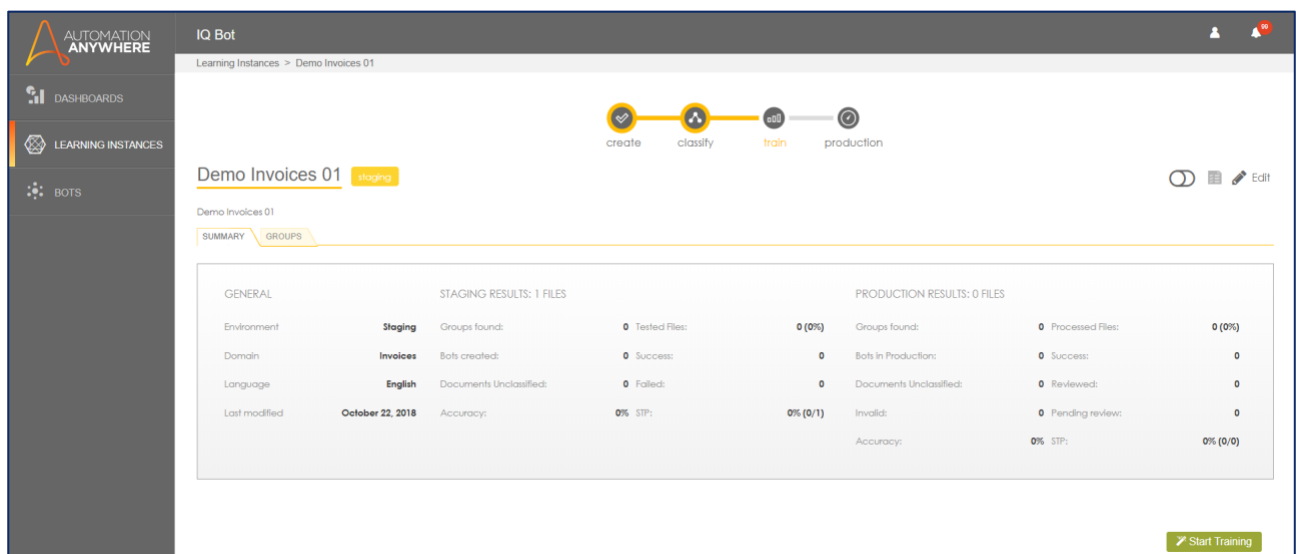
Tip: Besides image formats, such as TIFF, JPG, and PNG files, you can also upload PDF (Vector and Raster) documents for classification and analysis.

Notes: You can upload a file of maximum 12 MB size during learning instance creation/editing.

4. Select the standard form and table fields that you want to add from **Standard form fields** and **Standard table fields** sections.
5. Enter names of the form fields in the text box in **Other Fields (Optional)** section and click **Add as form** to add customized form fields. Similarly, you can add new table fields and click **Add as table**.
6. Click the **Create instance and analyze** button to create the instance.

The process of classification of invoice documents begins where the invoices are grouped together and analyzed. IQ Bot categorizes invoice documents similar in content layout and content in one or multiple groups.

You can now go ahead and train your IQ Bot for this learning instance by clicking on the **Start training** button.



IQ Bot
Learning Instances > Demo Invoices 01

create classify train production

Demo Invoices 01 staging Edit

Demo Invoices 01

SUMMARY GROUPS

GENERAL		STAGING RESULTS: 1 FILES			PRODUCTION RESULTS: 0 FILES		
Environment	Staging	Groups found:	0 Tested Files:	0 (0%)	Groups found:	0 Processed Files:	0 (0%)
Domain	Invoices	Bots created:	0 Success:	0	Bots in Production:	0 Success:	0
Language	English	Documents Unclassified:	0 Failed:	0	Documents Unclassified:	0 Reviewed:	0
Last modified	October 22, 2018	Accuracy:	0% STP:	0% (0/1)	Invalid:	0 Pending review:	0
					Accuracy:	0% STP:	0% (0/0)

[Start Training](#)

4 Training the Groups in a Learning Instance

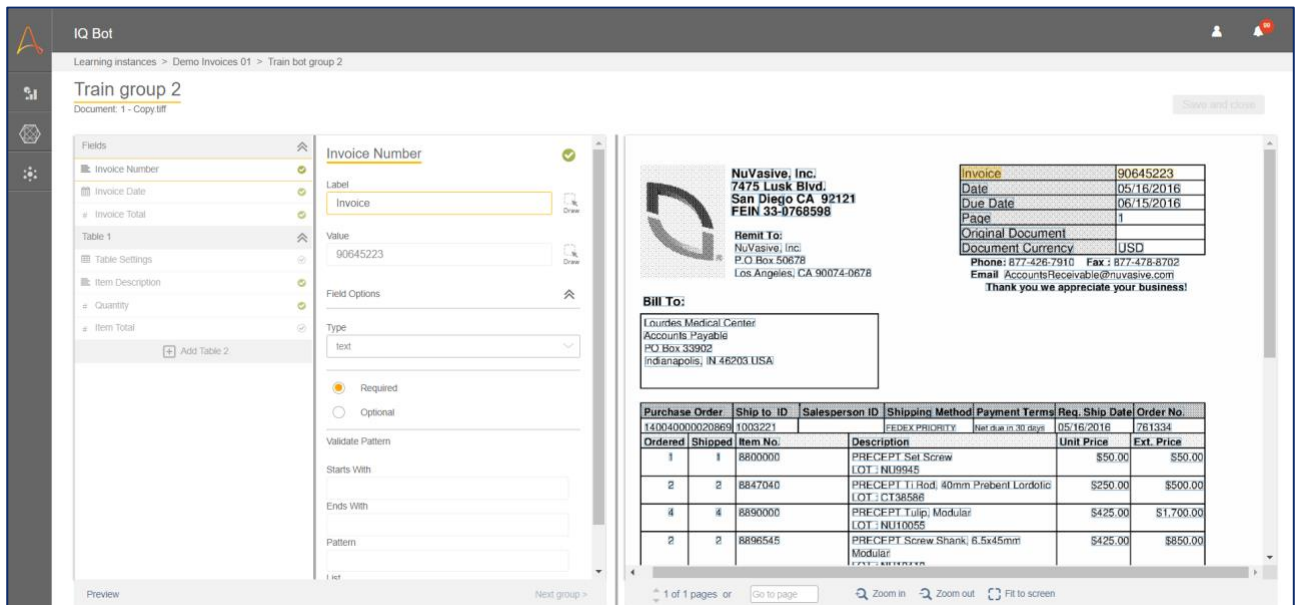
You need to train the groups in a learning instance so that when you extract data from documents to a CSV file, extracted data is more accurate.

NOTE: The Field Auto-Mapping feature reduces the time and effort it takes to train the invoice document.

To train a group:

1. After clicking on **Start Training** on the Learning Instances. The system displays a sample file on the right side and the mapped fields on the left side.

Note: Fields and corresponding values are mapped automatically, indicated by a green mark. If they are not mapped automatically, then map the fields manually.



The screenshot shows the 'Train group 2' interface. On the left, a list of fields is shown with a 'Draw' icon next to each. The 'Invoice Number' field is selected, and its value '90645223' is displayed in the 'Value' field. Below this, there are options for 'Field Options' (Type: text, Required/Optional) and 'Validate Pattern' (Starts With, Ends With, Pattern). On the right, a sample invoice document is displayed. The 'BILL TO' section is highlighted, and a table of items is shown below it. The table has columns for Purchase Order, Ship to ID, Salesperson ID, Shipping Method, Payment Terms, Req. Ship Date, and Order No. The items listed are PRECEPT Set Screw, PRECEPT Ti Rod, PRECEPT Tulip Modular, and PRECEPT Screw Shank Modular.

Purchase Order	Ship to ID	Salesperson ID	Shipping Method	Payment Terms	Req. Ship Date	Order No.
14004000020868	1003221		FEDEX PRIORITY	Net due in 30 days	05/16/2016	761334
Ordered	Shipped	Item No.	Description	Unit Price	Ext. Price	
1	1	8800000	PRECEPT Set Screw LOT : NU9945	\$50.00	\$50.00	
2	2	8847040	PRECEPT Ti Rod, 40mm Prebent Lordotic LOT : CT38586	\$250.00	\$500.00	
4	4	8890000	PRECEPT Tulip Modular LOT : NU10055	\$425.00	\$1,700.00	
2	2	8896545	PRECEPT Screw Shank, 6.5x45mm Modular LOT : NU10055	\$425.00	\$850.00	

2. Select a field name from the left pane.
3. Click on the corresponding label name for the field on the document. For example, click on Invoice Number. The value of Invoice Number is populated.

NOTE: The value of only auto-mapped fields is populated automatically.

4. Repeat steps 2 and 3 for each form and table field to map the fields again.
5. Click on the Draw icon next to the field name from the left pane and drag and click on the correct label name on the document to correct incorrect field mappings. Similarly, map the value of the field by clicking on the Draw icon.
6. Click on **Table Settings** in the left pane.

7. Select the **End of Table Indicator** text box in the left pane.
8. Select the last label in your table on the document to mark the end of the table.
The label is populated in the text box.

Figure 1: Train a Document

The screenshot displays the IQ Bot training interface. On the left, the 'Train group 2' configuration pane is active, showing the 'Invoice Number' field being trained. The 'Label' is set to 'Invoice' and the 'Value' is '90645223'. The 'Field Options' section shows 'Type' as 'text' and 'Required' as selected. A red box highlights the 'Next group >' button at the bottom of the configuration pane.

The right pane shows a preview of an invoice document. The document includes the following information:

NuVasive, Inc.
7475 Lusk Blvd.
San Diego CA 92121
FEIN 33-0768598

Remit To:
NuVasive, Inc.
P.O. Box 50678
Los Angeles, CA 90074-0678

invoice	90645223
Date	05/18/2016
Due Date	06/15/2016
Page	1
Original Document	
Document Currency	USD

Phone: 877-426-7910 **Fax:** 877-478-8702
Email: AccountsReceivable@nuvative.com
Thank you we appreciate your business!

Bill To:
Louden Medical Center
Accounts Payable
PO Box 33902
Indianapolis, IN 46203 USA

Purchase Order	Shipment ID	Salesperson ID	Shipping Method	Payment Terms	Req. Ship Date	Order No.
140040000020869	1000221		FEDEX PRIORITY	Net 30 in 30 days	05/18/2016	781334

Ordered	Shipped	Item No.	Description	Unit Price	Ext. Price
1	1	8800000	PRECEPT Self Screw LOT: NU5945	\$50.00	\$50.00
2	2	8847040	PRECEPT Ti Rod, 40mm Prebenit Lordotic LOT: CT38588	\$250.00	\$500.00
4	4	8890000	PRECEPT Tulip, Modular LOT: NU10055	\$425.00	\$1,700.00
2	2	8896545	PRECEPT Screw Shank, 6.5x45mm Modular	\$425.00	\$850.00

A group is now trained, and IQ Bot brings the next group in line to train. Train all the groups in your learning instance.

5 Previewing and Exporting Data

To export data to a CSV:

1. On the **Training** page, click **Preview** at the end of the left pane.
2. Verify if all the fields were extracted correctly
3. Click **Export to CSV**.

The CSV file is downloaded with the data extracted from the document.

6 Dashboard

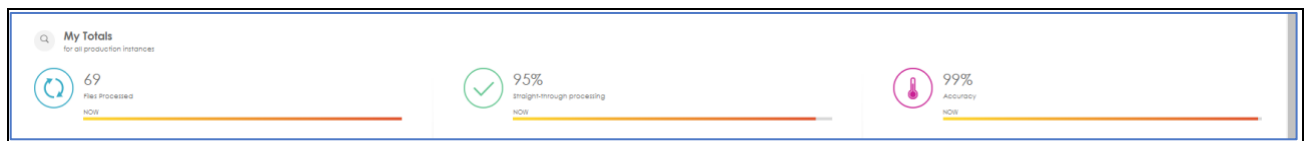
The dashboard is the hub of your IQ Bot Portal. It provides you with updates and information important to you and is the first page that opens when you log on to IQ Bot Portal. It graphically summarizes the performance report and provides information, such as the overall processing results, classification results, validation results, and accuracy for a specific Instance so that you can focus on the areas that needs your attention.

The IQ Bot Portal dashboard is divided into two areas, My Totals and My Learning Instances.

Three tabs of the Dashboard

My Totals:

This area of the dashboard displays the state of all Instances in the production environment.



You can view the following information for Instances that are in the My Totals area.

- **Files processed:** This is the total number of files uploaded against a learning instance, which are in the production environment.
- **Straight Through Processing (STP):** This is the percentage of total number of uploaded files that have been successfully processed without manual intervention.
- **Accuracy:** This is the field accuracy, which is the percentage of fields that have been accurately identified (fields whose Optical Character Recognition confidence levels exceed the confidence threshold that you set)