IQ BOT TRIAL - FREQUENTLY ASKED QUESTIONS

Contents

IQ Bot Trial FAQ

Introduction

IQ Bot is a purpose-built cognitive automation that you can train to automate business processes to work faster and efficiently 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, we've made five domains available for use such as: Invoices, Purchase Orders, Bank Statement, Pay Stubs, and 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.

FAQs for IQ Bot

Basic Concepts

1.   How does IQ Bot work?

IQ Bot leverages computer vision and multiple AI techniques to intelligently digitize and extract data to make your RPA more effective. IQ Bot uses OCR as one of the underlying technologies used to extract information from a document. This approach allows IQ Bot to adapt the data extraction from specific domains and document types, and quickly learn from the environment to improve results.

2.   What is a Learning Instance?

You would create a Learning Instance for a specific use case that an IQ Bot can learn from. It is domain-specific and has the capability to learn from documents classified and processed by it, and validation corrections performed by humans. This learning is translated to tangible benefits such as: improved Straight Through Processing and Accuracy figures for the Instance over a period.

3.   What's the difference between bots and Learning Instance?

A Learning Instance consists of training for the business process around a specific document type.

Bots contain training files that were classified by IQ Bot in different groups based on content.

You can activate or deactivate a bot in a learning instance to improve its training; while the learning instances would process documents that match the active bots as others remain in a queue, until that group is trained.

4.   What is the accuracy rate of IQ Bots?

The most primary metric for IQ Bot is straight through processing, or STP. It is dependent on the accuracy of field capture. Field accuracy impacts STP directly.

For example:

If a customer captures one to two fields across a Grade A quality document, an accuracy of 86% is achieved. A customer who captures 11 differentially weighted fields across highly varying document quality would see lower accuracy.

5.   How does the dashboard help?

The dashboard displays all production information and results that helps us identify how we could improve the training .

Note: The production information is not available for the trial version.

6.   What is percent (%) training?

The percent (%) training helps us estimate the STP that is calculated based on the number of bots trained and active.

Using IQ Bot trial

1. **What are the limitations of the trial version?**

   Flow Limitations: You can use IQ Bot for training only, as production mode and batch processing is not available.

   Processing Limitations: The user can create up to five learning instances and upload to a limit of 10 documents for each learning instance. Each document is limited to a single page only.

2. **I've trained the learning instance but can't see the output.**

   For each trained group, you can select **Preview → Export CSV** to see the output.

3. **I can't edit a group as the 'Edit bot' link is disabled.**

   The **Edit Bot** link appears disabled when the group is in production or when it is in training in another tab.

   Go to the **Bots** tab and send that bot back to staging.

4. **I've completed processing and want to process files in batch mode. How can I do that?**

   IQ Bot can process files in batch mode when connected to RPA. This feature is not available in the trial version.

5. **I want to add a new domain that is available in the Bot Store.**

   Importing domains is not available for the trial version.

6. **I can't see the results on the dashboard.**

   The dashboard displays information of processed files that are in production. This option is not available in the trial version.

7. **What is the prerequisite step to creating a Learning Instance in IQ Bot?**

   Before you start creating a new learning instance, you must know what information you want to extract from the documents you would be processing.

   It is best practice is to have some sample documents, which you can use as reference to decide on the items you want to extract. Use them as the first set of documents to train against the new learning instance.

8.   How would I perform validation in the trial?

Validation is available for production processes only. In the trial version, you can validate using **Preview**.

9.   How many simultaneous documents can be loaded into IQ Bot?

In the trial version, IQ Bot accepts up to a limit of 10 documents for each learning instance. The full license would support millions of documents per year that can be uploaded in a queue.

10.   What's the license requirement for IQ Bots?

You require Automation Anywhere Enterprise with an activated IQ Bot feature. This license is installed from the Control Room.

11.   How many tables can I configure to extract in a Bot?

You can configure unlimited number of tables for extraction.

12.   Can I test a document different than that used for training?

Yes, you can. Use the **Preview** option to navigate to other documents to verify if training was effective.

Learning

1. **Does IQ Bot learn from user inputs?**

   IQ Bot learns from the user inputs over time.

   For example: If a date is extracted often with an extra character such as spaces and dots between numbers, and the user corrects it a dozen times, IQ Bot would automatically correct the error when it encounters a similar problem the next time.

2. **How does IQ Bot differ from OCR solutions?**

   OCR is one of the underlying technologies in IQ Bot but is used only as a first step. IQ Bot is designed for business users, so anyone can start training an IQ Bot after a 3-hour training. The setup costs are 10x lower.

   Automation Anywhere is the only vendor that combines the best of RPA solution with cognitive automation to significantly reduce the cost and complexity in automating document-centric processes.

3. **How many templates do I have to train the IQ Bots on before it is ready for use?**

   The training requirement has been kept to a minimum, and in most cases, you should be able to get the desired value in just one pass.

Capabilities

4.   What are supported file types for IQ Bot?

The following are supported file types:

- PDF (Vector PDF, Raster PDF or Hybrid PDF)
- TIF or TIFF
- JPG or JPEG
- PNG

5.   Does IQ Bot support handwritten documents?

No, not yet. Processing handwritten document to achieve high STP is a challenge, but it is part of our roadmap.

6.   Does IQ Bot support tabular data extraction?

Yes, it does. IQ Bot has advanced table extraction features to support complex use cases such as: Explanation of Benefits.

7.   What are supported languages for IQ Bots?

IQ Bot supports the following languages out of box:

- English
- Spanish
- French
- German
- Italian

Additionally, it also supports over 25+ languages including all Latin scripts.

8.   Does IQ Bot support documents other than invoices?

Yes, IQ Bot supports a variety of domains, and you can quite easily add new domains as well.

The following domains are available in the trial version:

- Invoices
- Purchase orders
- Bank statements
- Pay stubs

- Electricity bills

Note: You can select the desired domain when you create a Learning Instance.

9. **Does IQ Bot support documents with multiple color text?**

   Yes, but this is true for darker shades of color only.

10. **Can I remove the default (pre-loaded) sample document for training and replace it with another from the group in a Bot?**

    Yes. If the default training document on the **Train** tab reflects all documents in that group, you can remove that document from the **Train** tab and upload a different one from the same group, and train it.

11. **Can I stop document analysis or processing in between?**

    No, you cannot stop a document analysis or processing mid-way.

12. **What is the maximum number of Bots I can create? What is the maximum number of IQ Bots that can simultaneously exist in the system at once?**

    There is no limit to the number of IQ Bots you can create or that can exist simultaneously in the system at a time.

13. **Is there a restriction to the number of characters for naming a Learning Instance?**

    You cannot exceed 50 characters when naming a Learning Instance.

14. **What is the average time to process a single page document? Is the time dependent on the complexity of the page?**

    There is no fixed time for processing a single page document as this depends on the following factors:
    - CPU strength and availability
    - Available free RAM
    - Page clarity OR noise level
    - Data on page

15. **Can I process MS Excel invoices using IQ Bot?**

If the invoices have a standard format, they can be processed using RPA tasks. In case the Excel formats vary, they need to be converted to PDFs, so they can be processed in IQ Bot.

Glossary

Active Directory (AD)

A **Bot Creator (BC)**: Directory service that provides user authentication, authorization in a typical enterprise

Bot

Bot: an application that performs an automated task and contains business process logic.

Bot Creator (BC)

Bot Creator (BC): Software used to author and upload bots.

Bot Runner (BR)

Bot Runner (BR) : Software used to run bots that have been authored using Bot Creator (BC). Bot Runners download bots from the Control Room (CR).

Control Room (CR)

Control Room (CR) : Software used to manage, monitor and deploy bots

Control Room Cluster

Control Room Cluster: A group of servers that are used to manage, monitor and deploy bots.

Data Tier

Data Tier: Group of machines which are responsible for providing data storage services.

Database (DB)

Database (DB): Software used to store metadata and other system data

Disaster Recovery (DR)

A **Disaster Recovery (DR)**: Deployment architecture that allows system availability to be restored via a backup datacenter due to unexpected events or natural disasters. Some downtime and loss of recently modified data is acceptable.

Enterprise Identity Management

Web Browser: Use an enterprise identity management system such as: Active Directory (AD), or a SAML identity provider, to authenticate users.

High Availability (HA)

High Availability (HA): Deployment architecture that maintains system availability within a single datacenter when a subset of the system fails.

Learning Instance

Create a **Learning Instance** for a specific use case that an IQ Bot can learn from.

Load Balancer

Load Balancer: Network Load Balancer that distributes HTTP(S) requests between Control Room Cluster members.

Microsoft SQL Server

Microsoft SQL Server: Primary database used to store all critical data related to Control Room (CR) operation including: Bot, access control and analytics information.

PostgreSQL

A **PostgreSQL**: Database server software

PostgreSQL Server

PostgreSQL Server: Database used to store metadata related to analytics dashboards.

REST API (REST)	A **REST API (REST)**: Protocol used to expose business services to clients
Security Assertion Markup Language (SAML)	**Security Assertion Markup Language (SAML)**: Security Assertion Markup Language (SAML) is an XML-based framework for authentication and authorization between two entities: A Service Provider and an Identity Provider. The Service Provider agrees to trust the Identity Provider to authenticate users. In return, the Identity provider generates an *authentication assertion*, which indicates that a user has been authenticated. SAML is a standard Single Sign On (SSO) format. Authentication information is exchanged through digitally signed XML documents. It's a complex single sign-on (SSO) implementation that enables seamless authentication, mostly between businesses and enterprises.
Single Sign On (SSO)	**Single Sign On (SSO)**: Property of access control of multiple related, yet independent, software systems. With this property, a user logs in with a single ID and password to gain access to a connected system or accomplished using the Lightweight Directory Access Protocol (LDAP) and stored LDAP databases on (directory) servers.
SMB File Share	**SMB File Share**: Used by all members of the Control Room Cluster to store or cache bots and configuration information. It must be accessible by every Control Room (CR) server.
Service Tier	A **Service Tier**: Group of machines tasked with hosting services that implement business logic and serve static assets such as images and JavaScript.
Subversion Server	**Subversion Server**: When the optional Bot versioning feature is enabled, bots are stored and versioned in an external Subversion Version Control (SVN) server.
Subversion Version Control (SVN)	**Subversion Version Control (SVN)**: Software optionally used to manage and track bot versions
Web Browser	**Web Browser**: Used by users and administrators to access the Control Room (CR).