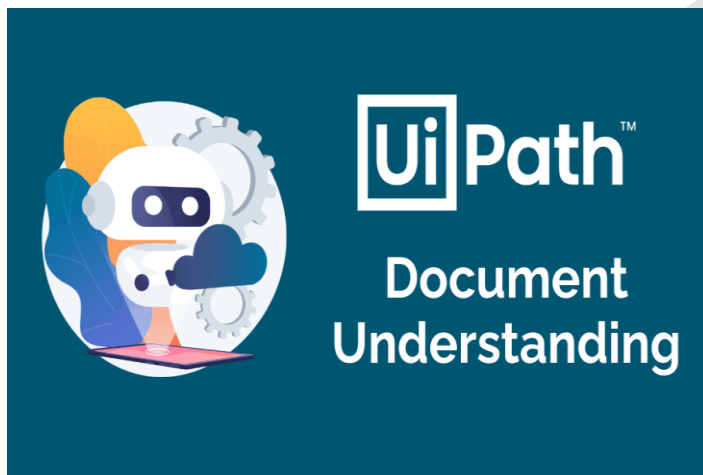


UiPath Document Understanding

Author: -

Amar Ekatpure

RPA Developer



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Purpose

The purpose of this document is to understand the process of creating the document Understanding flow in UiPath. How to automate and streamline the extraction of data from unstructured documents. It enables businesses to efficiently process large volumes of documents such as invoices, receipts, forms, and contracts, extracting highly accurate relevant information. Document Understanding leverages advanced machine learning techniques to classify documents, extract key data fields, and validate the extracted information. By automating document processing, UiPath's Document Understanding helps businesses save time, reduce errors, and improve operational efficiency.

UIPATH DOCUMENT UNDERSTANDING

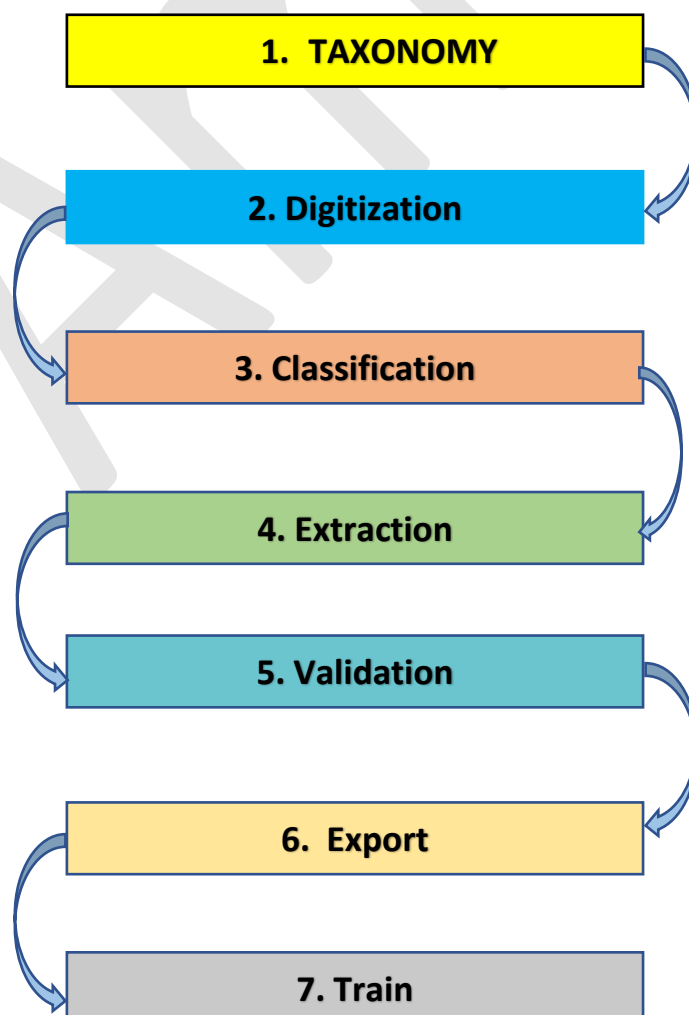
What is Document Understanding in UiPath?

➡ Document Understanding is the ability to extract the data with interpret information in the interpreted meaning using AI & ML technics.

Packages are required for the Document Understanding.

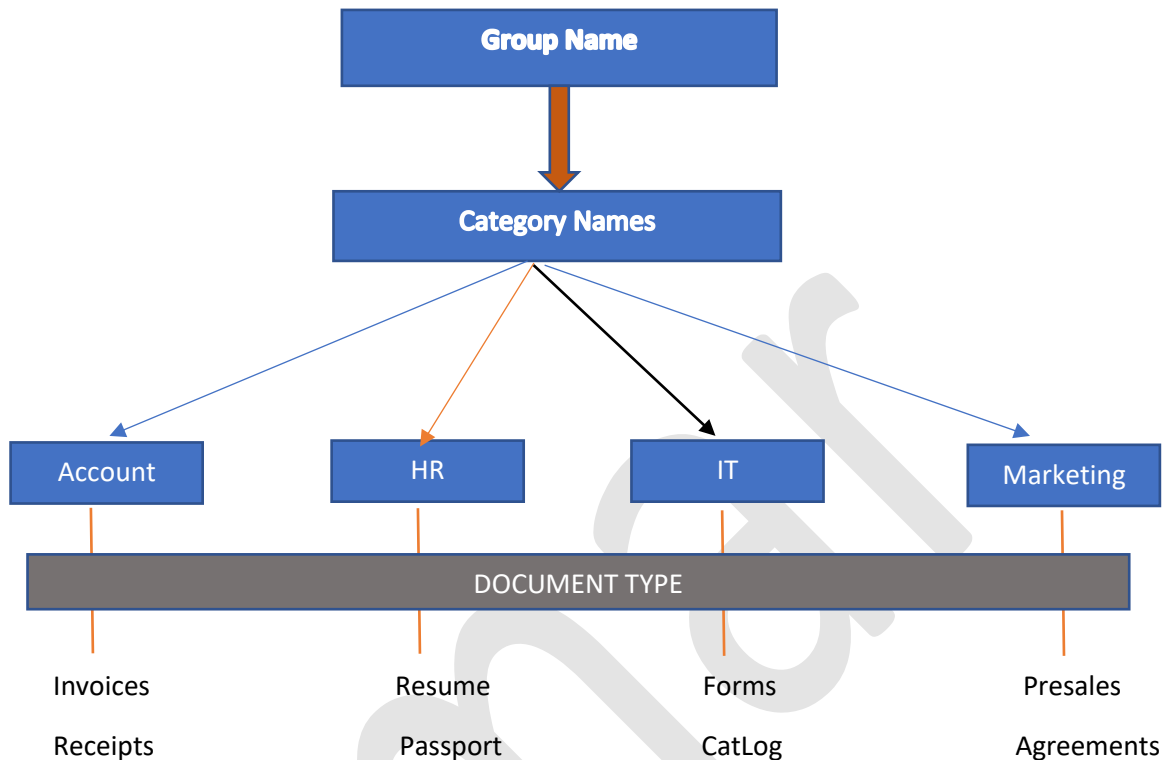
1. [UiPath.IntelligentOcr.Activities.](#)
2. [Uipath.Omnipage.Activites.](#)
3. [UiPath.MachineLearning.Activity.](#)

DOCUMENT UNDERSTANDING FRAMEWORK STEPS: -



1. TAXONOMY: -

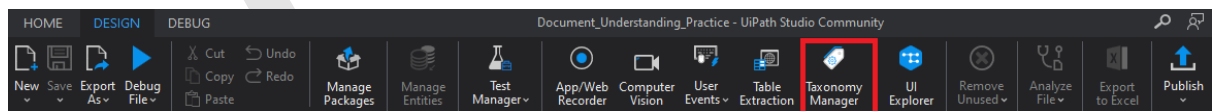
The scientific process of arranging things into groups.



Package required : - [UiPath.IntelligentOcr.Activities](#).

1. Go to manage package select all packages & search the [UiPath.IntelligentOcr.Activities](#). & install.

Go to the ribbon tab see if the taxonomy is available or not if its available open that.



2. After opening the taxonomy create the Group, category & Document type

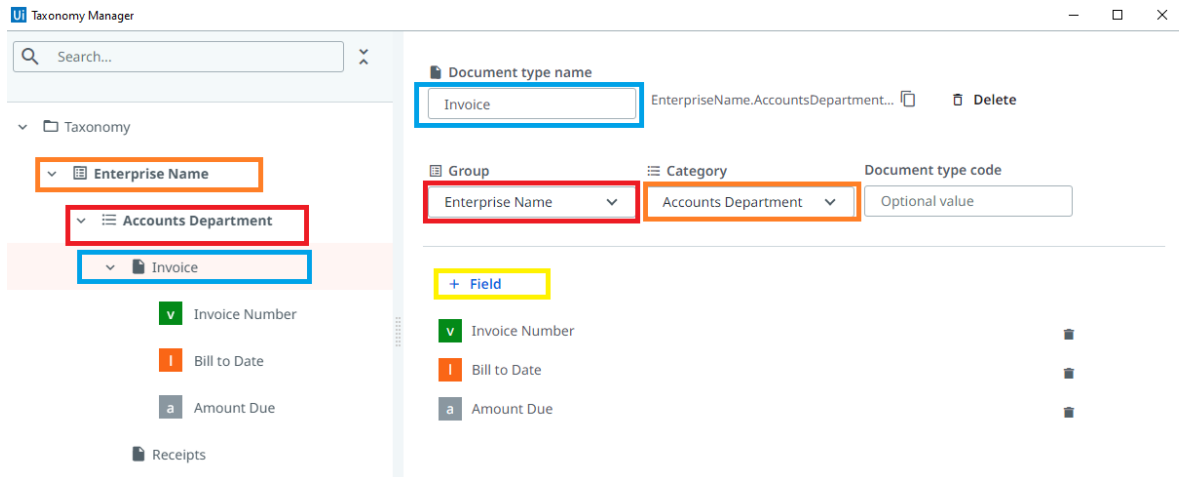
Example:-

Group Name: - Enterprise Name

Category: - Account Department

Document Type: - Invoice

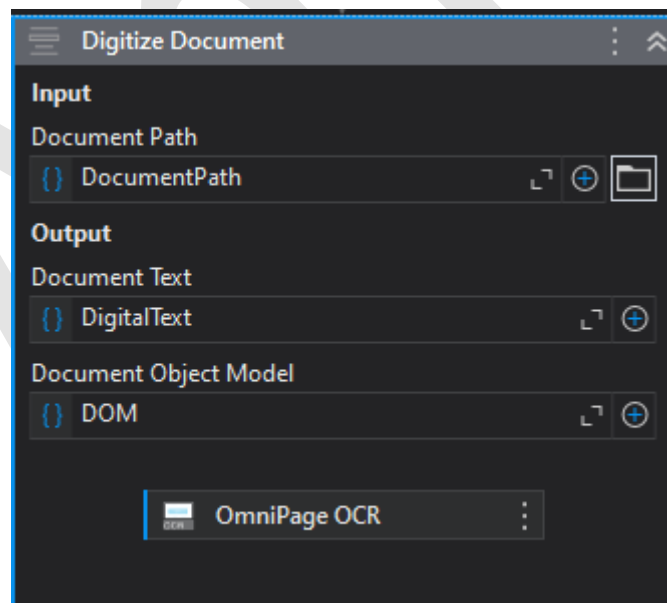
Add Field : - Extracted Field name



Drag the taxonomy into the studio & Create the variable Taxonomy.

2. Digitization: -

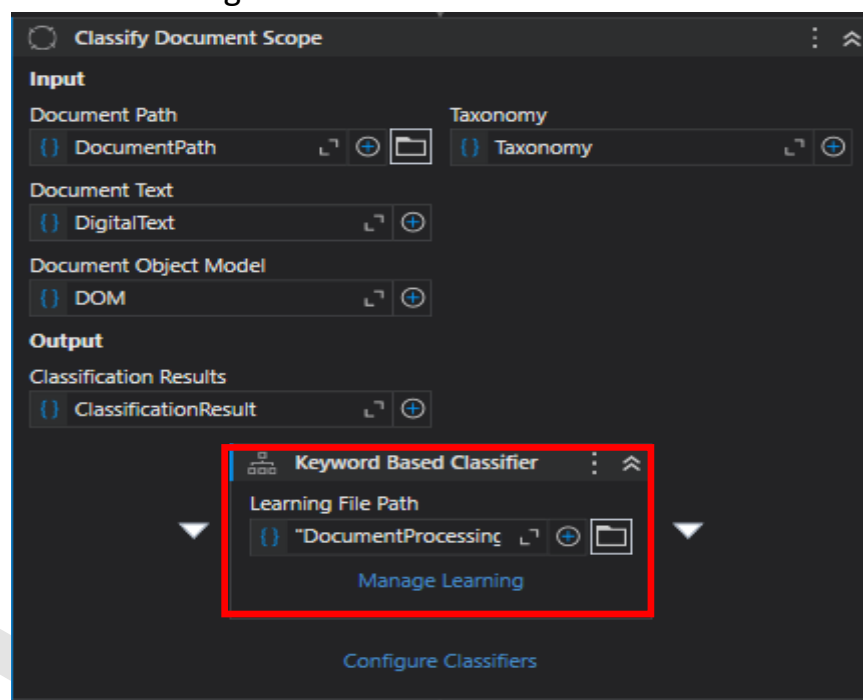
1. Drag the digitized document from the activity panel.
2. Drag the Omni Page OCR inside Digitize Document. & it will convert them to digital output.
3. Create the variable for that.



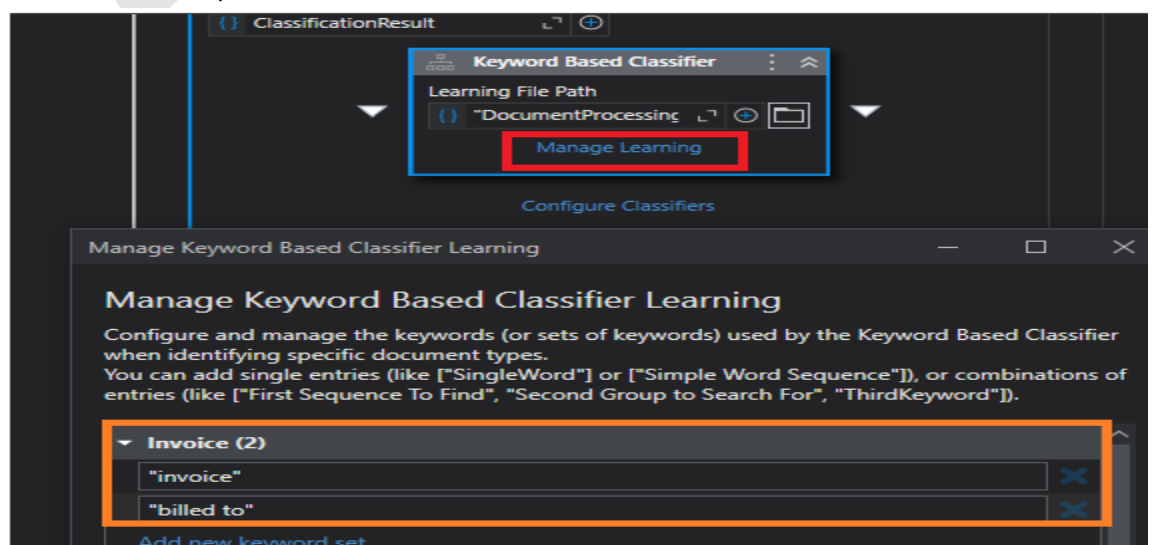
Variable Name	Variable Type
Digital Text	String
DOM	Uipath.DocumentProcessing.Contracts.DOM.Document

3. Classify Document Scope: -

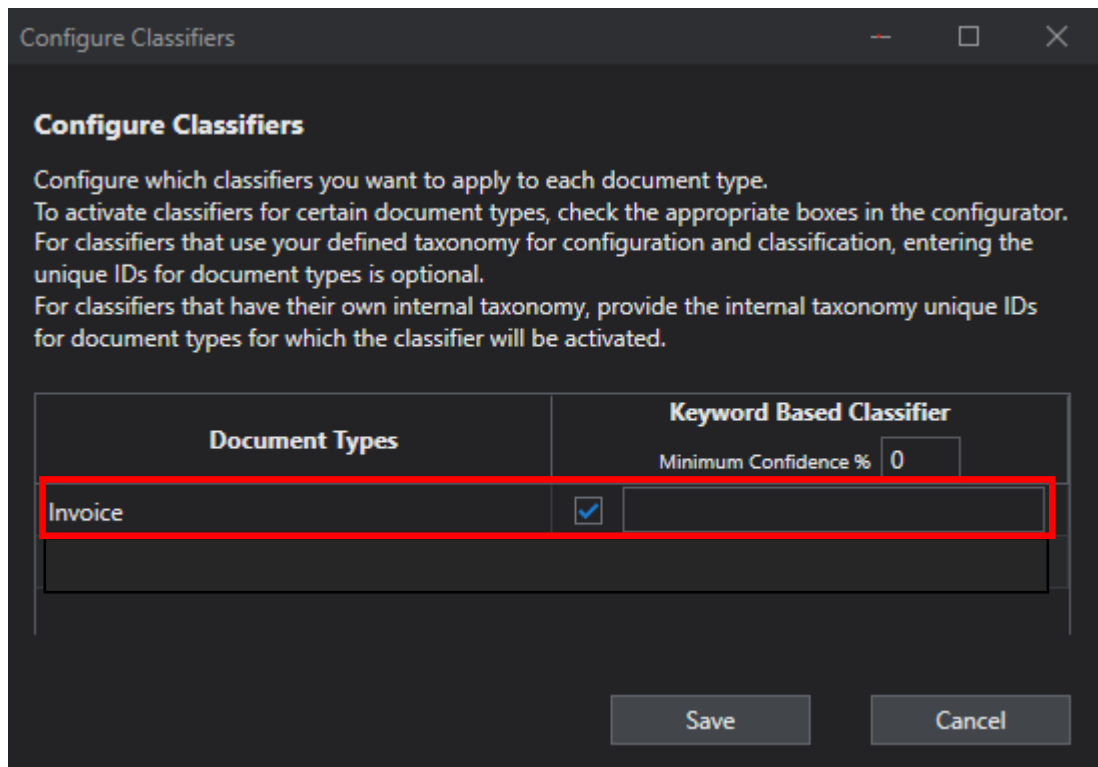
1. Drag the classified document scope from the activity panel.
2. Pass all the variables for that & create a new variable for the classification result.
Ex: Classification Result.
3. Drag the Keyword based classifier. In the learning, file path provides the path of taxonomy Jason file path which is available in the Document Processing Folder.



4. Click on manage learning and use the keywords like “invoice number”, “invoice date”, “billed to” etc.



5. Click on the configure classifier & select the Document type(✓)& click on save.



Variable Name	Variable Type
ClassificationResult	Uipath.DocumentProcessing.Contracts.Results.ClassificationResult[]

4. Data Extraction Scope: -

1. Drag the data extraction scope from the activity panel.
2. Pass all the variables for that & create a new variable for the Extraction result.
Ex: ExtractionResult.

5. Extraction & Validation: -

There are three types of extractors available in the document understanding.

1. **Regex-Based Extractor.**
2. **Form-Based Extractor.**
3. **Machine Learning Extractor.**

1. Drag the Machine learning extractor inside the Data Extraction Scope.
2. After dragging that activity it will show you the pop up in that pop up write

the End Point URL & API Key.

3. For the API key go to your orchestrator account

Click on admin.



Click on Licenses.



Click on Robot & Services



Copy Document Understanding API Key

Machine Learning Extractor

Endpoint
URL to the ML server. Example endpoints using UiPath models are, for Invoices: <https://invoices>.

ApiKey
Authentication key

☒ Update activity arguments

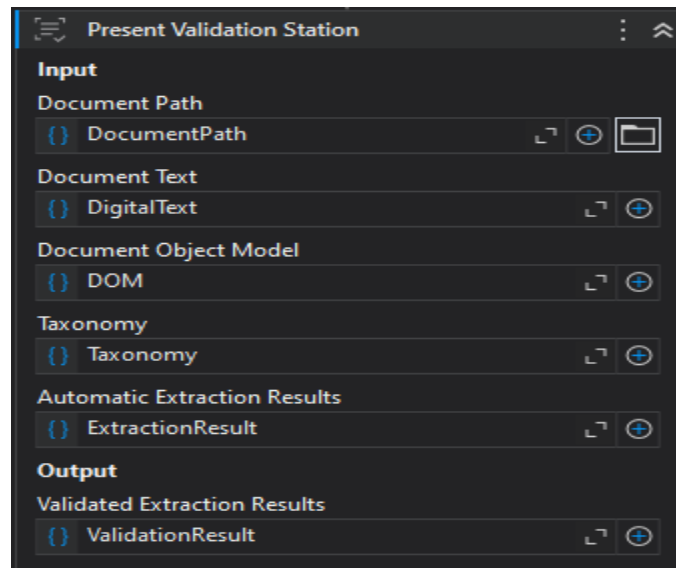
Get Capabilities Cancel

After that click on get capabilities & select the capabilities related to their fields from the drop-down.

Validation: -

Drag the Present Validation Station activity from the activity panel & pass all the variables for that to create a new variable for Validation Extraction Result.

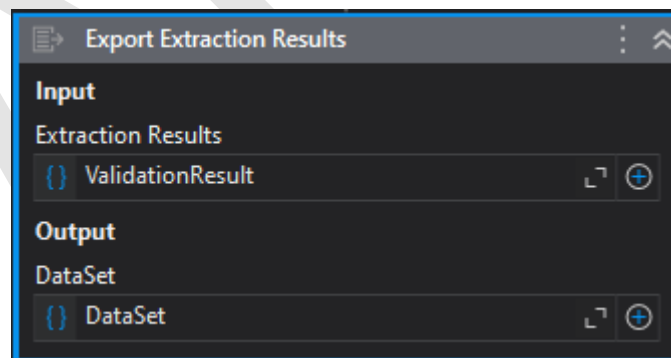
Ex: ValidatedExtractionResult.



Variable Name	Variable Type
ValidatedExtractionResult	Uipath.DocumentProcessing.Contracts.Results.ExtractionResults

6. Export Extraction Result: -

1. Drag the Export Extraction Result activity & pass the input variable as ValidationResult.
2. Create a new variable in the Dataset.



Write this Output as per your requirement by using For each activity.

Interview Questions for Document Understanding

[Q 1. How many steps do you have in UiPath document understanding?](#)

[Q2. What Is Taxonomy in UiPath?](#)

[Q3. Can you name one package you need to install for the document Understanding?](#)

[Q4. What is a taxonomy Jason file & what it contains & how it gets created?](#)

[Q5. What is the use of load taxonomy activity?](#)

[Q6. What is Digitization in UiPath DU?](#)

[Q7. Is Ocr Engine is used every time in the digitize process?](#)

[Q8. What is the output of the digitization step in DU?](#)

[Q9. What is the purpose of classifying document scope in DU?](#)

[Q10. What is Keyword based classifier?](#)

[Q11. What is the output of classified document scope activity?](#)

[Q12. Name 3 Major categories of extractors available on UiPath.](#)

[Q13. Where exactly do you create templates for the document types from Taxonomy?](#)

[Q14. How will you validate the extracted results of the data extraction Scope?](#)

[Q15. How will you export the validated results?](#)

..... THANK YOU