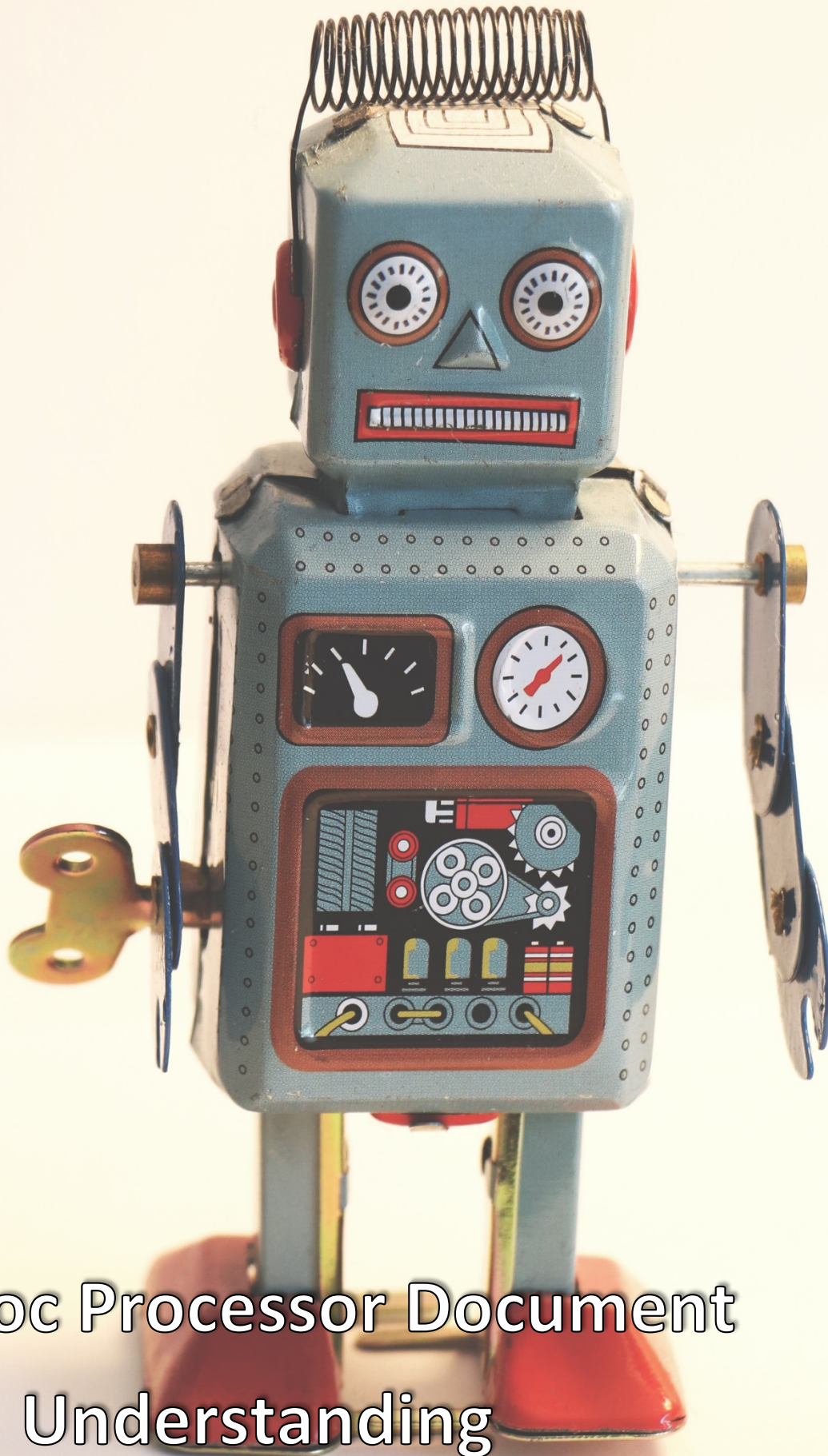


Project by Brayan Jimenez



Mail Doc Processor Document
Understanding

USE CASE

As is process:

Process video:

https://drive.google.com/file/d/1h_BRIF5rJ39vvyTle-TcOqKxn9-2LFVZ/view?usp=sharing

A customer sends the following types of documents via Outlook:

- Invoice
- Receipt
- W9 Form
- Certificate of filing

These documents are required to be extracted from the email automatically, then downloaded, then uploaded to rows in the orchestrator, then processed to extract the data from each type of document for later export to Excel, the information will be extracted from each pdf file and then exported in an Excel for each type of document.

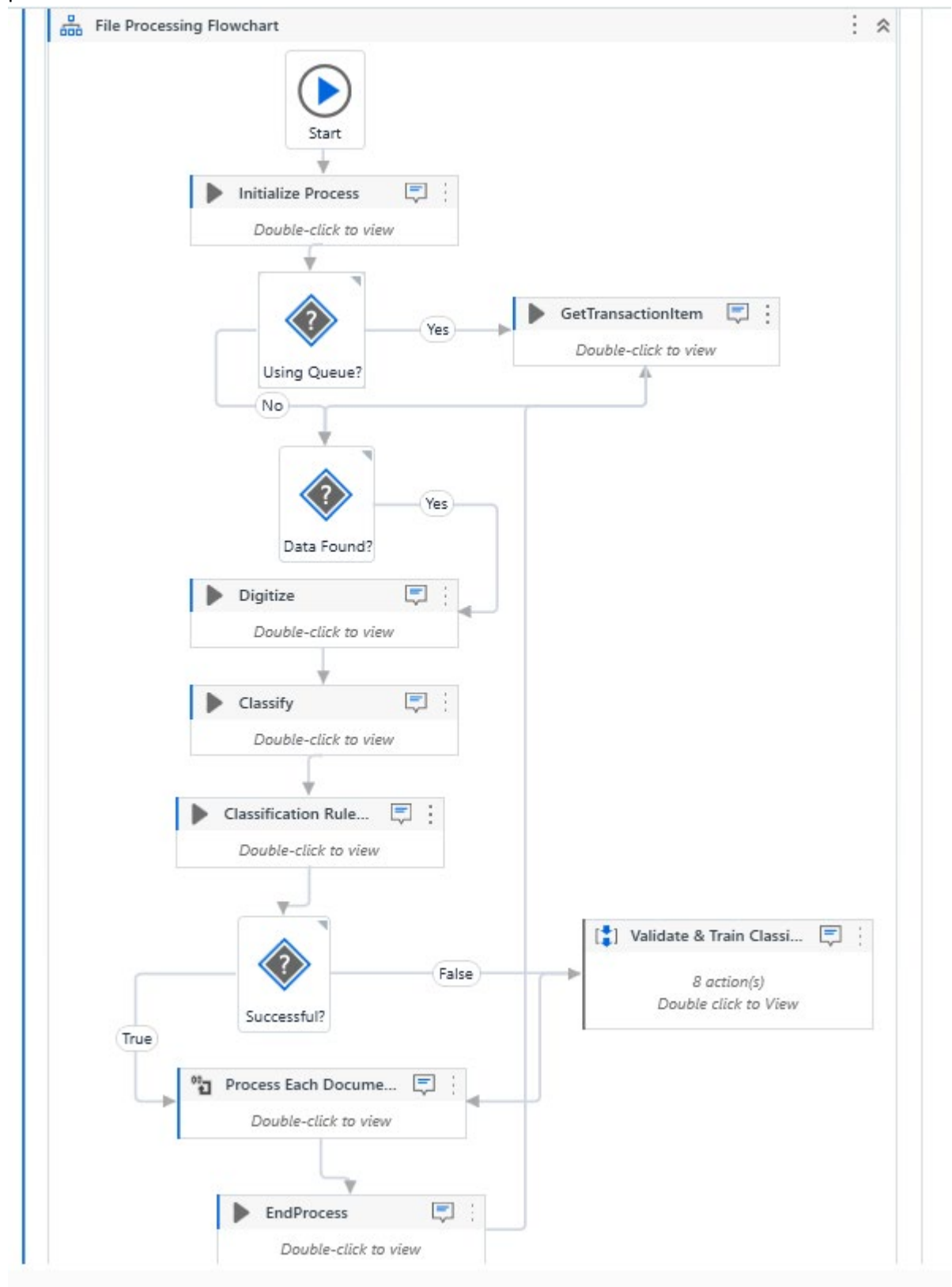
Triggers should be used, to trigger the dispatcher, and triggers to trigger the performer.

To be process:

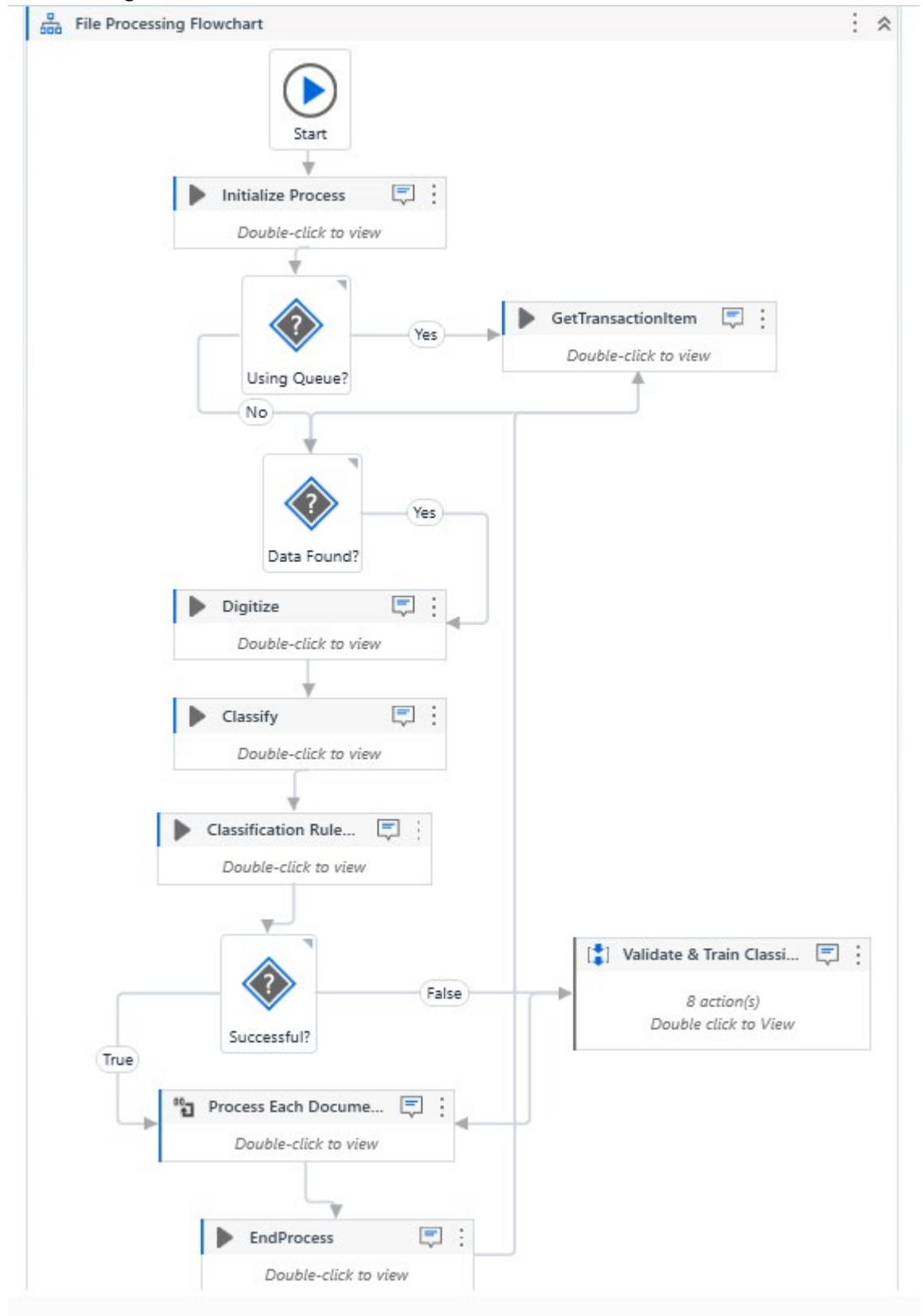
- A queue is created in the orchestrator which is where all the documents will be loaded afterwards.
- The dispatcher is created by means of REFramework for linear process to upload the documents downloaded via Outlook to the Queue in the orchestrator.
- Integration service is used to use an event trigger through a connection with Outlook 365. This trigger will be used by the dispatcher and will allow the dispatcher to be automatically triggered when new items, in this case downloaded documents, are uploaded to the queue. The event trigger monitors Outlook to receive an email with the subject "Uiopath" and containing documents.
- The performer is created by means of the Document Understanding Framework and the file is configured, first the settings are configured and the DocumentUnderstandingQueueName, Target file, ExportsFolder, etc. are indicated. Then the assets sheet is configured. For this, all the assets are first created in the orchestrator to be able to use them in the asset sheet of the config file.
- Document Understanding framework works under the concept of a single job, which means that unlike REFramework, it only executes one job or transaction at a time, so you would have to run the performer several times if there are several documents. There are two options, either it is executed several times to process each invoice, or a modification is made to run it once and process all invoices with a single job, this last option is the one we will apply in this case.
- The classification and validation will be done through Action Center.
- It is important to create and edit the ASSETS





The branch not coming from the Flow decision "Data found?" is eliminated and also the end process branch is connected with the Workflow GetTransactionItem, in this way multiple pdf are

processed.







If the objective is to work under the concept of a "Single job" the workflow should have the following structure:







 DispatcherDuProject	10/25/2023 8:06 PM	File folder
 FilesInput	10/25/2023 9:30 PM	File folder
 FilesOutput	10/25/2023 9:42 PM	File folder
 PerformerDuProject	10/26/2023 8:51 PM	File folder

- Documents saved from the dispatcher and the trigger

 Certificate of filing.pdf	10/25/2023 9:30 PM	Microsoft Edge P...	93 KB
 Invoice.pdf	10/25/2023 9:30 PM	Microsoft Edge P...	32 KB
 Receipt.pdf	10/25/2023 9:30 PM	Microsoft Edge P...	1,722 KB
 W-9.pdf	10/25/2023 9:30 PM	Microsoft Edge P...	1,209 KB

- When the documents are processed (classified, validated, and exported). It will produce the following exports

 Certificate of filing_1-1.xlsx	10/25/2023 9:32 PM	Microsoft Excel W...	7 KB
 Invoice_1-1.xlsx	10/25/2023 9:34 PM	Microsoft Excel W...	10 KB
 Receipt_1-1.xlsx	10/25/2023 9:37 PM	Microsoft Excel W...	10 KB
 W-9_1-1.xlsx	10/25/2023 9:41 PM	Microsoft Excel W...	8 KB