

Problem Statement: Design IQ BOT**Actions used:****1. IQ Bot : Upload Document**

IQ Bot : Upload Document action is used to upload the Production-ready documents from Automation Anywhere Enterprise to IQ Bot for processing.

2. IQ Bot : Download all documents

IQ Bot : Download all documents action is used to download the extracted results from an IQ Bot server that were created by running a Bot with the Upload Document action.

Steps to create and execute IQ Bot :

Step 1: Create a new Learning Instance for IQ bot. Give proper name to the instance. Select document type and primary language of documents. Upload your documents. Click on download sample documents if you don't have any documents to upload.

The screenshot shows the 'Create new learning instance' interface. At the top, there are tabs for 'create', 'classify', 'train', and 'production'. The 'create' tab is active. The page title is 'Create new learning instance'. Below the title, there is a description: 'Complete the required fields and upload documents (for example, Invoices) so your learning instance can classify, train, and learn to improve your biggest document challenges.' There are two buttons: 'Cancel' and 'Create instance and analyze'. The 'General information' section has a heading 'Select your document type and primary language'. It includes an 'Instance name' field with the value 'IQ_Bot', a 'Description (optional)' field, a 'Document type' dropdown menu set to 'Invoices', and a 'Primary language of documents' dropdown menu set to 'English'. Below this is the 'Upload your documents' section, which says 'Upload documents (max. 150)' and shows 'You selected 3 file(s) to upload'. There are 'Browse' and 'Download sample documents' buttons.

Step 2 : Select fields to extract from your document. Click on create instance and analyze.

The screenshot shows the 'Fields to extract' configuration page. It has a sidebar with 'LEARNING INSTANCES' and a main content area. The title is 'Fields to extract'. Below the title, it says 'Select fields to extract from your documents'. There are several sections: 'Common form fields' with checkboxes for 'Invoice Date', 'Invoice Number', 'Invoice Total', 'Account Name', and 'Account Number'; 'Additional form fields' with a collapse icon; 'Common table/repeated section fields' with checkboxes for 'Item Description', 'Item Total', 'Quantity', 'Item Freight', and 'Item Misc Fees'; 'Additional table/repeated section fields' with a collapse icon; 'Advanced Settings' with a collapse icon; and 'Checkbox auto-detection' with a collapse icon. At the bottom right, there are 'Cancel' and 'Create instance and analyze' buttons.

Step 3: Review the mapping of the fields with the document and check the values of each fields. Do the necessary change if required. Click on save and go to next group if no changes are required.

Review group 24863 mapping

Learning instances > IQ_Bot1 > Review group 24863 mapping

Invoice1.tiff View each Group 24863 document

See extraction results Save and close Save and go to next group Delete bot

To train a group:

- Click each field (left panel) to verify the label and value (center panel) is the same as the document (right panel).
- Preview the mapping after all fields are verified.
- Save and go to the next group.

Fields

- Invoice Date
- Invoice Number
- Invoice Total
- Table-repeated-section-1
- Table/section settings
- Item Description
- Item Total
- Quantity

Column - Quantity

Data type: number

Column name: Quantity

Column value: Quantity

Column options

Document Preview:

Quantity	Item no.	Description	Unit Price	Tax	Amount
1	1001	Widget Type A	22.00	G	22.00
1	1002	Bracket - Widget Type C	36.75	G	36.75
Subtotal					
Tax1 (GST) @ 7%					
Invoice Amount					62.86
Terms: 2% 10 Net 30					

Step 4 : Click on “See extraction results” button and check if the values extracted are correct or not.

Results for group 24864

Invoice4.tiff

Export to CSV

Browse all the documents in the group using the "<" and ">" keys.

Fields

- Invoice Date: 22 Aug 2018
- Invoice Number: 10283
- Invoice Total: 695.39
- Table-repeated-section-1

Table-repeated-section-1

Item Description	Item Total	Quantity
Sprocket - Med	37.90	2
Bracket - Widget Type A	14.50	2
Widget Type B	150.00	20
Bracket - Widget Type C	367.50	10

Document Preview:

Automation Anywhere, Inc.
833 River Oaks Parkway, San Jose, CA 95134, USA
Tel: (509) 222-1234

Sold to: Ultron Inc.
1801 Toldeo Beach Rd #1188
La Salle, MI 48145

Ship to: Ultron Inc. - Receiving Dock
8385 N Russell Rd
Oak Harbor, OH 43449

Invoice no.: 10283
Invoice Date: 22 Aug 2018
Purchase Order: 26540

Table:

Quantity	Item no.	Description	Unit Price	Tax	Amount
2	1010	Sprocket - Med	18.95	G	37.90
2	1004	Bracket - Widget Type A	7.25	G	14.50
20	1002	Widget Type B	7.50	G	150.00
10	1007	Bracket - Widget Type C	36.75	G	367.50
1	1013	Labor	80.00	G	80.00
Subtotal					
Tax1 (GST) @ 7%					
Invoice Amount					62.86
Terms: 2% 10 Net 30					

Step 5 : Train the bot and validate if an error occurs set the value of field again.

Validator

Search by filename

Mark as invalid Save current document

Group 24864 - Invoice1.tiff - 3 document(s) remaining

Fields

- Hide successful fields
- Hide optional fields

Table-repeated-section-1

Item Description	Item Total	Quantity
Sprocket - Med	62.86	2
Bracket - Widget Type A	\$	2

Document Preview:

Subtotal

Tax1 (GST) @ 7%

Invoice Amount 62.86

Terms: 2% 10 Net 30

Step 6 : Once training is complete, set the bot to the production.

The screenshot shows the 'Learning instances > IQ_Bot1' page in the Automation Anywhere interface. At the top, a progress bar indicates the bot's lifecycle: create, classify, train, and production. The 'production' stage is highlighted. Below this, a 'DOCUMENT GROUPS' section shows a 'SUMMARY' tab with a 'Groups' table. The table lists 'Group_24864' with a 'Training %' of 100%. A 'Refresh' button is located at the top right of the table.

Name	Description	Label	In use by	# of trainin...	Training su...	Training un...	# of produc...	Pages upto...	Production ...	Production ...	Priority	IT	Actions
Group_24864	3	0	3	4	4	0	0	20		Go to bot

Step 7 : Create a new bot. Use IQ Bot : Upload Document action to upload the document for processing. Select server instance and Provide file path.

The screenshot shows the 'IQ Bot: Upload Document' action configuration in the Automation Anywhere interface. The 'Server instance' is set to 'IQ_Bot1'. The 'File path' is set to 'SampleDocs\Invoices\invoice1.tiff'. The 'Group Label (optional)' is set to 'SampleDocs\Invoices\invoice1.tiff'. The 'Save the response to variable (optional)' is set to 'Choose a variable'.

Step 8 : Create a new bot. Use IQ bot: Download all document action to download the extracted result. Select the bot server and give the folder name to save the downloaded files and run the bot.

The screenshot shows the 'IQ Bot: Download all documents' action configuration in the Automation Anywhere interface. The 'Server instance' is set to 'IQ_Bot1'. The 'IQ Bot document status' is set to 'Success'. The 'Local output folder' is set to 'C:\Users\Saurabh\Documents\SPPT\Process Automa'. The 'Delete files from the server after downloading' checkbox is unchecked. The 'Save the response to a variable (optional)' is set to 'Choose a variable'.

Output-

	A	B	C	D	E	F	G	H
1	Invoice_Di	Invoice_N	Invoice_Total	Item_Description	Item_Tota	Quantity	Result	File Path
2	#####	10280	62.86	Widget Type A	22	1	TRUE	
3	#####	10280	62.86	Bracket - Widget Type C	36.75	1	TRUE	
4								

Conclusion :

In this practical we learned about IQ bots. By using IQ bot we extracted the data from documents to the excel files. In order to run the IQ bots, we have to create learning instances first. By using the IQ Bot : Upload documents action we upload the Production-ready documents from Automation Anywhere Enterprise to IQ Bot for processing. Whereas by using IQ Bot : Download all documents action we can download the extracted results from an IQ Bot server that were created by running a Bot with the Upload Document action.