

Use Gen AI to Identify and Validate Documents

Instructor-led lab guide



Last Updated: Monday, November 3, 2025 – 1:45 AM

Table of Contents

1 Lab Introduction	3
1.1 Lab Scenario	3
2 Lab Instructions	4
2.1 Acquire Tech Zone Lab Environment	4
2.1.1 Request Tech Jam Workshop Tech Zone Envriomnet	4
2.1.2 Reserve IBM watsonx Orchestrate ADK and DBA - US East Only	4
2.2 DBA-4-2022 VM Setup	4
2.3 Open Web Process Designer.....	5
2.4 Open Process App.....	5
2.5 Author GenAI Service Flow.....	7
2.5.1 Create Service Flow.....	7
2.5.2 Add GenAI Activity	9
2.5.3 Create Service Flow Variables.....	10
2.5.4 Author the GenAI Activity	11
2.5.5 Select the LLM	11
2.5.6 Create Input to LLM.....	12
2.5.7 Define Prompt Input.....	13
2.5.8 Define Prompt Context	14
2.5.9 Define Parameters.....	14
2.5.10 Test the Gen AI Task	15
2.5.11 Map Gen AI Task Activity to Service Flow Variables	16
2.6 Add Gen AI Service Flow to Human Task	18
2.6.1 Examine the "My Document Identification and Validation" Client Side Human Service	18
2.6.2 Add "My VerifyDoc" Service Flow.....	21
2.6.3 Associate "Generate Summary" Button with "My VerifyDoc" Service Flow	22
2.6.4 Map "My VerifyDoc" Service Flow Interface	25
2.7 Test the "My Document Identification and Validation" CSHS	27

1 Lab Introduction

This hands-on lab explores IBM Business Automation Workflow (BAW) enhanced by Generative AI (GenAI) to streamline business processes and improve decision-making. Participants will gain practical experience integrating GenAI capabilities into workflows to automate content generation, enhance decision logic, and optimize task management. In this lab, attendees will learn how to leverage AI-powered intelligent documents within IBM BAW.

1.1 Lab Scenario

In this lab, you will complete the implementation of a Human Task Activity (highlighted in green in the figure below), which is part of a procurement Process.

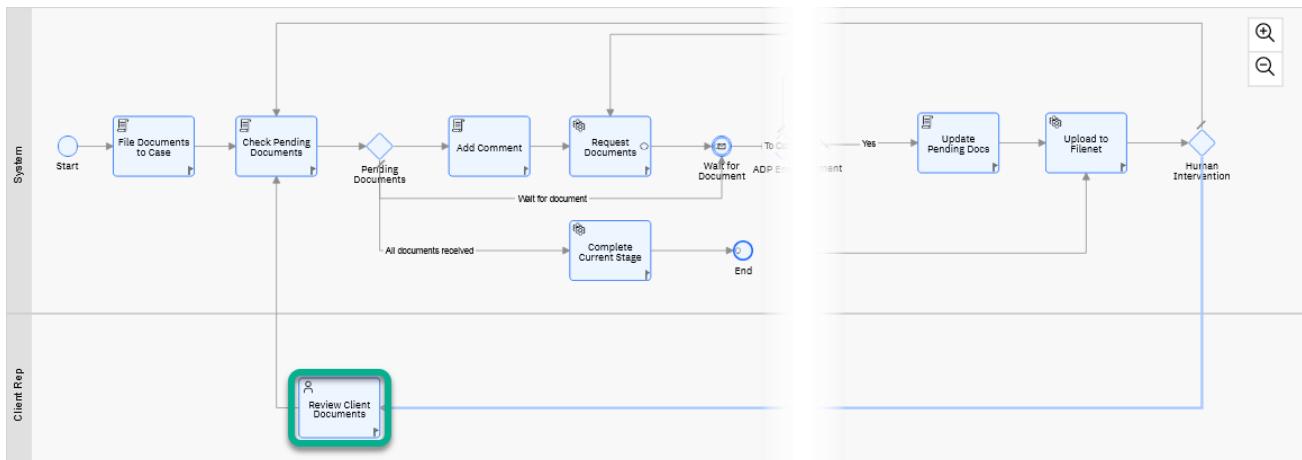


Figure 1. Client Onboarding Case: Review Documents Process

In this activity, a client onboarding specialist must review and validate the client documents. In this lab, you will create an automation that uses LLM to assist the client onboarding specialist. The LLM will automatically classify and summarize the document.

2 Lab Instructions

- _ 1. Use this link to download the **wxO Agent Builder ADK Orchestrate Edocument** document: <https://ibm.ent.box.com/v/wxO-Agentic-SDK>. You may need it when provisioning the environment on your own, and later on when starting the VMs

2.1 Acquire Tech Zone Lab Environment

You can either request a Tech Jam Workshop Tech Zone environment ([2.1.1](#)) or provision your own ([2.2.2](#)).

2.1.1 Request Tech Jam Workshop Tech Zone Envriornmnet

- _ 1. Request an envriornmnet using this Slack channel [#ba-wxo-tech-jam-access](#)
- _ 2. You will receive a URL and a private password/access code.
- _ 3. Use the URL to access your Tech Jam lab VMs.

2.1.2 Reserve IBM watsonx Orchestrate ADK and DBA - US East Only

1. Find section "1.1 Reserve Tech Zone Environment" in **wxO Agent Builder ADK Orchestrate Edocument** document.
2. Create a Tech Zone reservation:

Note: This environment includes the Digital Business Automation VM, which provides the IBM Business Workflow runtime required for this lab.

2.2 DBA-4-2022 VM Setup

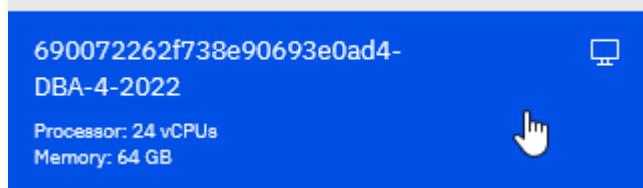
1. Find section "1.3.1.2 Create a Remote Desktop Session" in the **wxO Agent Builder ADK Orchestrate Edocument** document.
2. Open the VM using either the Console or the Remote Desktop method (described in "[1.3.1.2 Create a Remote Desktop Session](#)")

Note:

The Console method access will vary depending if you are using a Workssop or your own Tech Zone Reservation.

Workshop:

VM Remote Console:



Your Own Tech Zone Reservation:

Virtual Machines

Name	OS	IP	Status	Console	⋮
68eff80d926501b4673f452a-DBA-4-2022	Microsoft Windows Server 2022 (64-bit)	10.0.0.6	Running		⋮
68eff80d926501b4673f452a-WxO-Lite-TechJam	Microsoft Windows Server 2022 (64-bit)	10.0.0.2	Running		⋮

- _ 3. Find section "1.3.2 Start IBM Business Automation Workflow Server" in the **wxO Agent Builder ADK Orchestrate Edocument** document.

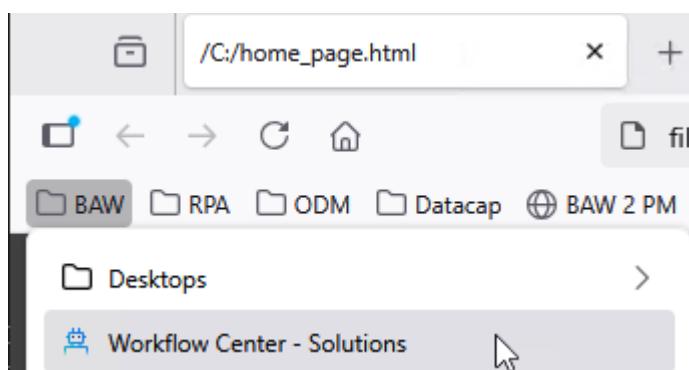
_4. Start the BAW Server as described in “**1.3.2 Start IBM Business Automation Workflow Server**”.

2.3 Open Web Process Designer

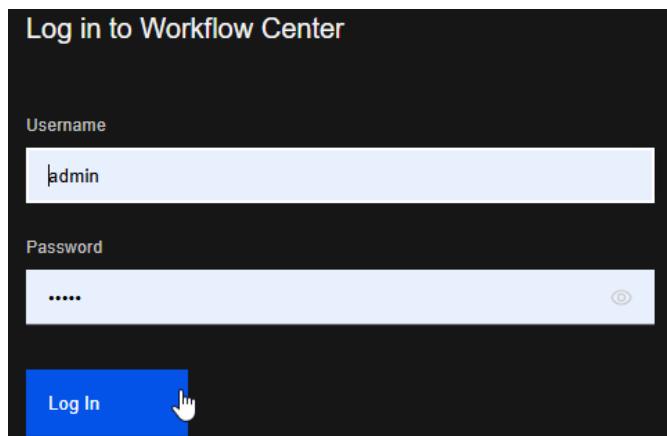
_1. Start the **Firefox** Web Browser.



_2. From the Web browser toolbar, select the **BAW > Workflow Center - Solution**.

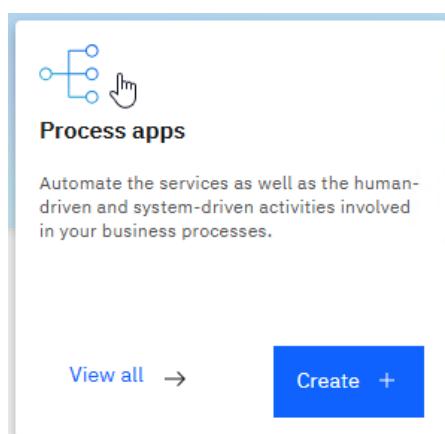


_1. For Username, enter '**admin**', and for password, enter '**admin**'. Then, click **Log In**.

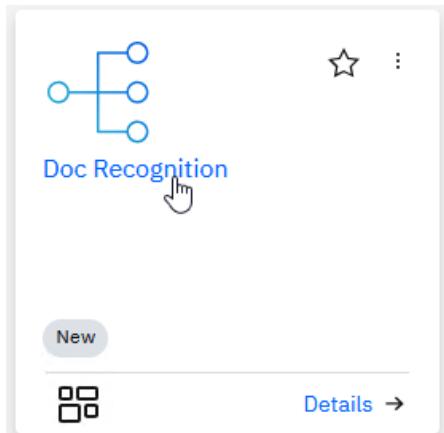


2.4 Open Process App

_1. Click **Process apps**.



_2. Click **Doc Recognition**.



2.5 Author GenAI Service Flow

You will now create a Service Flow with a GenAI Activity to assist knowledge workers in verifying and summarizing customer-submitted documents during the onboarding process.

For example, given a utility bill, Gen Ai will classify and summarize it as shown below.

Digital Document	Verification and Summarization by Gen AI								
<p>Account No. 1109646555 Bill Period. 04-01 - 05-01-2022 Page 1/2</p>  <p>CABLEPORIUM</p> <p>Service For Customer Name: Automation Elite Account Number: 1109646555 Service Address: 3974 Carson St, Lansing, MI 48911 Bill Period: 04-01-2022 - 05-01-2022 Bill Due On: 05-05-2022</p> <p>Monthly Statement Summary</p> <table border="1"> <tr> <td>Previous Balance</td> <td>\$ 60.05</td> </tr> <tr> <td>Payment Received</td> <td>-\$ 60.05</td> </tr> <tr> <td>New Charges - see details</td> <td>\$ 62.76</td> </tr> <tr> <td>Total Amount Due</td> <td>\$ 62.76</td> </tr> </table> <p>bill saving tips: internet speed quality depends on the number of users in your home and what you're using it for. if grandparents aren't going to have the same need for internet speed as their grandchildren, smaller households can have email, web browsing, music, and HD streaming by using as little as 20 mbps of download speed. DTHL, HDL, web browsing, gaming, and HD video streaming for three devices can be achieved with as little as 30 mbps of download speed.</p> <p>ways to pay: you may pay your bill by sending a check using the enclosed return envelope. you may also opt to pay with your credit or debit card via our website. you can also enroll your card for auto debit option for your convenience.</p> <hr/> <p>CABLEPORIUM Cableporum PO BOX 1105 Pompano Beach, Florida 33060 US [REDACTED]</p> <p>Automation Elite 3974 Carson St, Lansing, MI 48911</p> <p>[REDACTED]</p>	Previous Balance	\$ 60.05	Payment Received	-\$ 60.05	New Charges - see details	\$ 62.76	Total Amount Due	\$ 62.76	<p>This document is a Bill.</p> <p>Summary:</p> <ul style="list-style-type: none"> * Company: Automation Elite * Address: 3974 Carson St, Lansing, MI 48911 * Dates: <ul style="list-style-type: none"> + Bill Period: 04-01-2022 - 05-01-2022 + Bill Due On: 05-05-2022
Previous Balance	\$ 60.05								
Payment Received	-\$ 60.05								
New Charges - see details	\$ 62.76								
Total Amount Due	\$ 62.76								

The Gen AI Activity you will create shortly will use a one-shot prompt (no training) to enable it to summarize and classify three types of documents: Utility Bills, Back Statements, and Annual Reports.

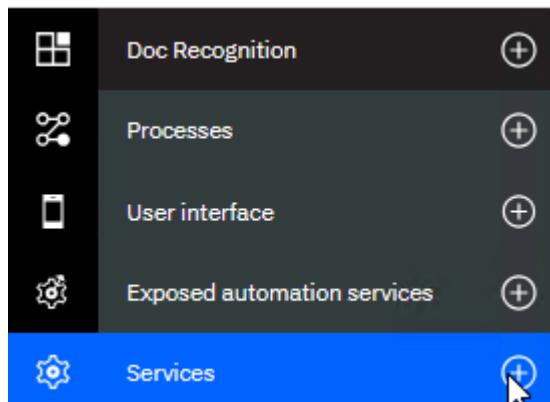
2.5.1 Create Service Flow

You will create a Service flow that, given a text extracted from a digital document, will classify and summarize it.

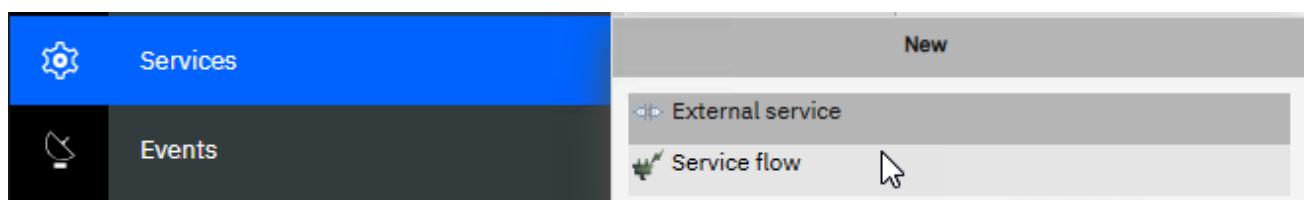
Note that we have already created a solution Service Flow for you. You can use it as a reference.

The screenshot shows the IBM Workflow Center interface. On the left, there's a sidebar with icons for Doc Recognition, Processes, User interface, Exposed automation services, Services (which is selected and highlighted in blue), and Events. The main area displays a list of service types: Deployment service flow (1 item), External service (1 item), and Service flow (2 items). The 'Service flow' section is highlighted with a red box, and the first item in this list, 'ExtractDocText', is also highlighted with a red box. The 'VerifyDoc' service is listed below it.

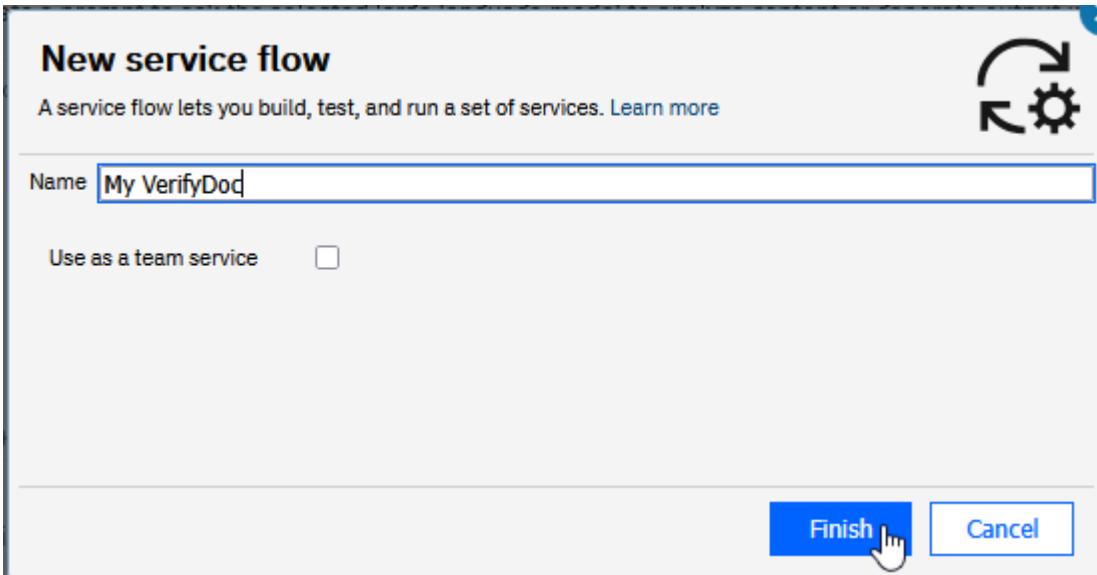
_1. Click the + on Services.



_2. Click Service flow.

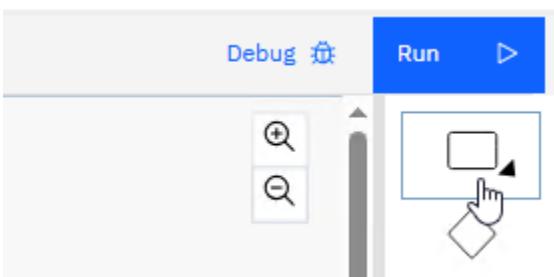


_3. Enter **My VerifyDoc** and click **Finish**.

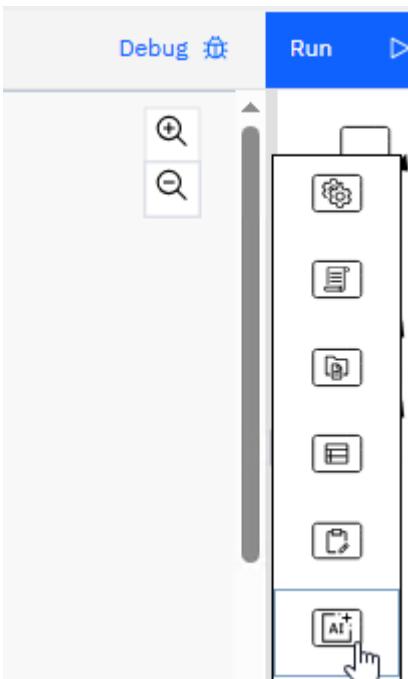


2.5.2 Add GenAI Activity

_1. Click the **Activity** palette.



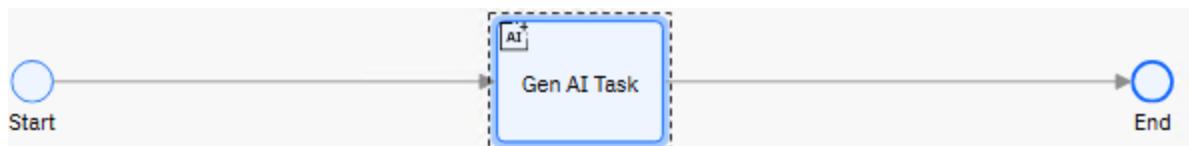
_2. Select the **Generative AI** activity.



_3. While holding the left mouse button, **drag and drop** it onto the wire between the Start and End nodes.

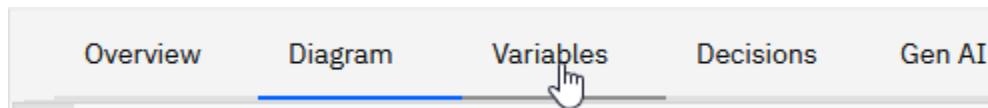


_4. Ensure the Gen AI Task AI Activity has been added as shown below:

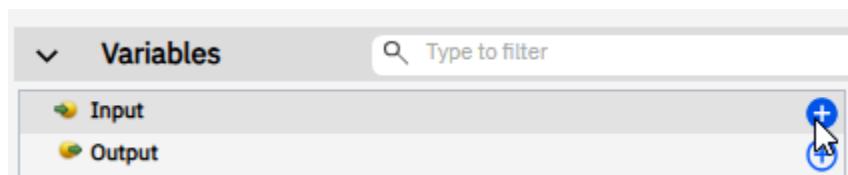


2.5.3 Create Service Flow Variables

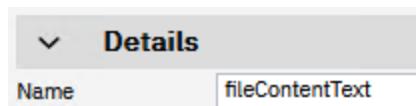
_1. Click the **Variables** tab.



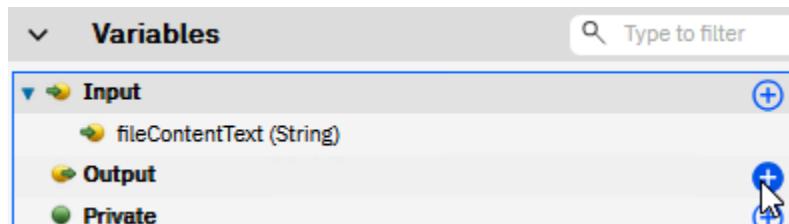
_2. Click the **+** icon on the input.



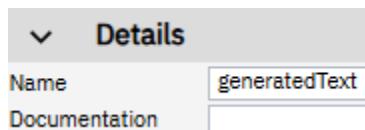
_3. For **Name**, enter **fileContentText**



_4. Click the **+** icon on the **output**.

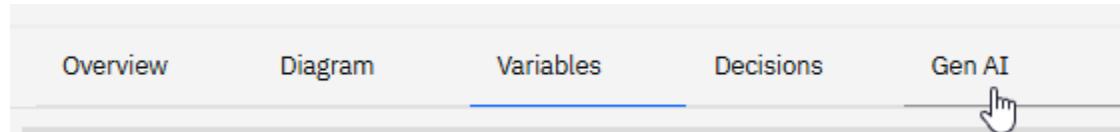


_5. For **Name**, enter **generatedText**.

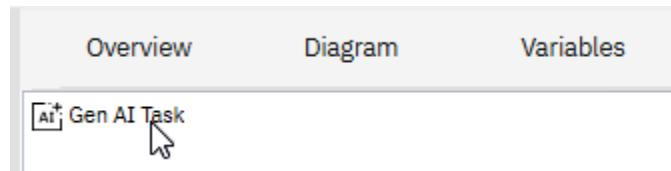


2.5.4 Author the GenAI Activity

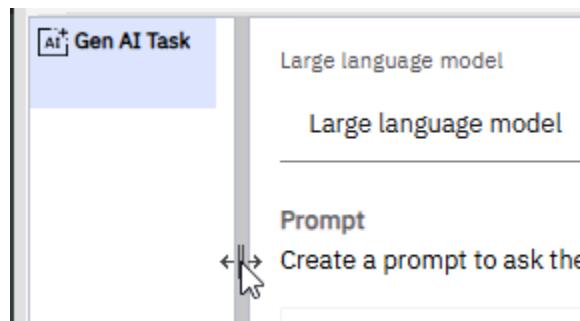
- _1. Click the **Gen AI** tab.



- _2. Click **Gen AI Task**.



- _3. Capture the divider and drag it to the left to expand the Gen AI Editor.



2.5.5 Select the LLM

The IBM Business Automation Workflow is connected to an IBM watsonx.ai instance, which provides a selection of LLMs.

- _1. From the Large language model dropdown, select **meta-llama/llama-3-2-11b-vision-instruct**.

Large language model

Large language model ^

- ibm/granite-3-8b-instruct** 8192 max tokens
The Granite model series is a family of IBM-trained, dense decoder-only models, which are particularly well-suited for generative tasks.
- ibm/granite-4-h-small** 0 max tokens
Granite-4.0-H-Small is a 30B parameter long-context instruct model finetuned from Granite-4.0-H-Small-Base using a combination of open
- ibm/granite-8b-code-instruct** 16384 max tokens
The Granite model series is a family of IBM-trained, dense decoder-only models, which are particularly well-suited for generative tasks.
- ibm/granite-guardian-3-8b** 8192 max tokens
The Granite model series is a family of IBM-trained, dense decoder-only models, which are particularly well-suited for generative tasks.
- ibm/granite-vision-3-2-2b** 8192 max tokens
Granite 3.2 Vision is a image-text-in, text-out model capable of understanding images like charts for enterprise use cases for computer
- meta-llama/llama-2-13b-chat** 4095 max tokens
Llama-2-13b-chat is an auto-regressive language model that uses an optimized transformer architecture.
- meta-llama/llama-3-2-11b-vision-instruct** 8192 max tokens
Llama-3-2-11b-vision-instruct is an auto-regressive language model that uses an optimized transformer architecture.

_2. Verify that the **meta-llama/llama-3-2-11b-vision-instruct** is your LLM.

Large language model

 **meta-llama/llama-3-2-11b-vision-instruct**

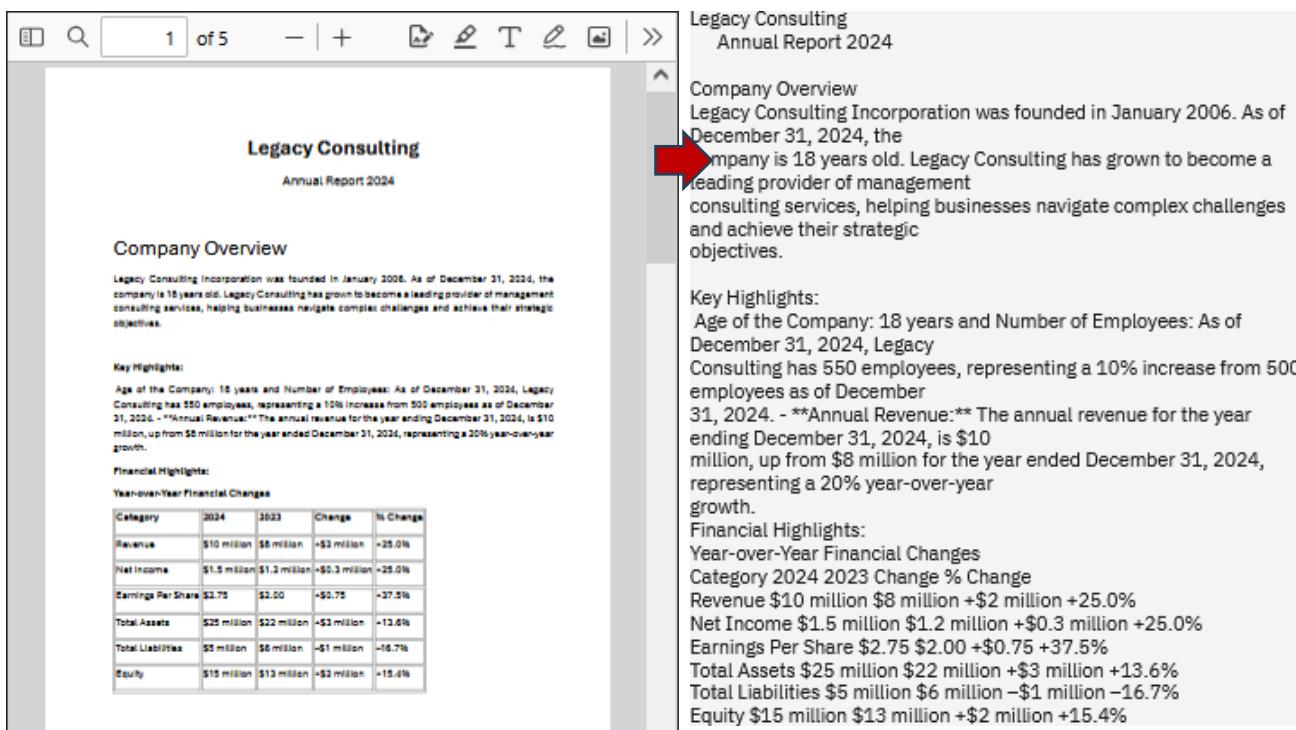
Why did we choose this LLM over another?

The Meta-Llama 3.2-11B-Vision-Instruct model is a multimodal instruction-tuned LLM that can process both text and images. It excels at visual question answering, image captioning, document analysis, and multimodal chat — any scenario where understanding and reasoning over images (with or without accompanying text) is required. It has ~11 billion parameters and supports long-context reasoning (up to ~128K tokens).

However, in this lab, to conserve the precious tokens, we will not supply raw images as the input to this model. Instead, we will first extract text from the image and use it as the input.

2.5.6 Create Input to LLM

The input variable will provide the LLM with the text extracted from the PDF quote file.



Legacy Consulting
Annual Report 2024

Company Overview
Legacy Consulting Incorporation was founded in January 2006. As of December 31, 2024, the company is 18 years old. Legacy Consulting has grown to become a leading provider of management consulting services, helping businesses navigate complex challenges and achieve their strategic objectives.

Key Highlights:
Age of the Company: 18 years and Number of Employees: As of December 31, 2024, Legacy Consulting has 550 employees, representing a 10% increase from 500 employees as of December 31, 2024. - **Annual Revenue:** The annual revenue for the year ending December 31, 2024, is \$10 million, up from \$8 million for the year ended December 31, 2024, representing a 20% year-over-year growth.

Category	2024	2023	Change	% Change
Revenue	\$10 million	\$8 million	+\$2 million	+25.0%
Net Income	\$1.5 million	\$1.2 million	+\$0.3 million	+25.0%
Earnings Per Share	\$2.75	\$2.00	+\$0.75	+37.5%
Total Assets	\$25 million	\$22 million	+\$3 million	+13.6%
Total Liabilities	\$5 million	\$6 million	-\$1 million	-16.7%
Equity	\$15 million	\$13 million	+\$2 million	+15.4%

_1. Click Add variables + in the Variables section.

Variables

Add variables that you can use in your prompt. T

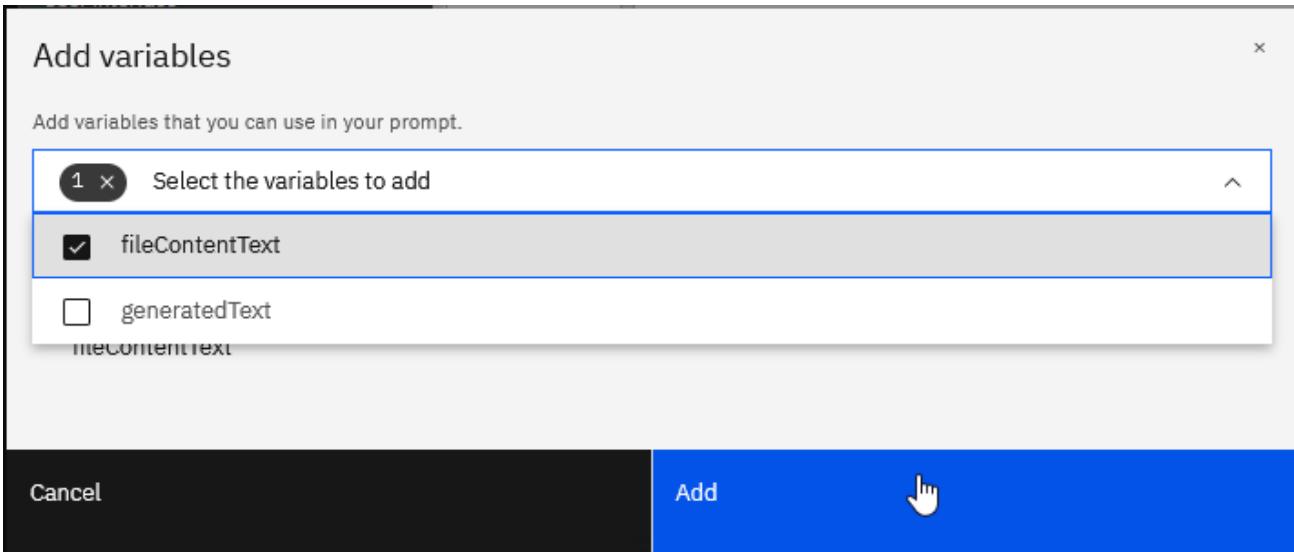


No variables

Select and add variables to use in your prompt.

Add variables 

_2. From the dropdown, select "fileContentText" and then click "Add."



_3. In the **Value column**, enter the following text for the quote Variable.

Banking Information Focus Corp This banking information provided here will be used by Focus Corp to withdraw the monthly services fee. Client Name Automation Elite Inc. Bank Name The Digital Bank Bank Phone Number +1-289-333-1234 Bank Address 2190 New Orchard Road, Armonk, New York - 10504 Routing Number 91373084 Account Number 1179476345 Account Type Checking Savings Other By submitting this form, you authorize Focus Corp to withdraw the monthly services fee from the specified bank account. Date 4/21/2021

Variable	Value
fileContentText	Corp to withdraw the monthly services fee from the specified bank account.

2.5.7 Define Prompt Input

You will define the input the LLM will receive every time you call this Service Flow.

_1. In the *Input section* of the Prompt definition, click the **Add variable +** button.

Prompt

Create a prompt to ask the selected large language model to analyze content or generate output in the context of your process.

The screenshot shows a "Prompt" configuration interface. On the left is a "Context" panel with instructions: "Provide instructions and context to your prompt." and "Insert variables in your context to use values dynamically." On the right is an "Input" panel with instructions: "Enter your input here. Insert variables in your input to use values dynamically. For example: Write something about {{topic}}." At the bottom center is a "Add variable" button with a blue outline and a white cursor icon pointing to it. There is also a small "+" icon in the bottom-left corner of the main area.

2. Select **fileContentText**..

Input

Enter your input here. Insert variables in your input to use values dynamically.
For example: Write something about {{topic}}.

+

fileContentText 

3. You should now see that the input to the LLM is the *fileContentText* variable you will pass to this Service Flow.

Input

{{fileContentText}}

2.5.8 Define Prompt Context

You will define a prompt to instruct the LLM to categorize and summarize a document.

We will use a one-shot prompt with no training examples!

1. In the **Context** section of the *Prompt* definition, add the **text below**.

Identify the document as Bill, Banking Information, or Annual Report.
Provide a summary of the document, including only the names or company names, addresses, and dates.
Do not include any amounts.

Prompt

Create a prompt to ask the selected large language model to an:

Context

Provide instructions and context to your prompt.
Insert variables in your context to use values dynamically.



2. The Context section should look exactly as shown below.

Context

Identify the document as Bill, Banking Information, or Annual Report.
Provide a summary of the document, including only the names or company names, addresses, and dates.
Do not include any amounts.

2.5.9 Define Parameters

To limit the length of the generated output, we can specify the minimum and maximum number of tokens that the LLM can generate from the Parameters pane. In our case, we will need more than the default 50 tonnes.

What is a token?

A token is a sequence of characters that holds semantic meaning for a model. Before LLM processing, the words in your prompt text are converted into tokens. Similarly, the raw output from the model is also in the form of tokens. These output tokens are then converted back into words to be displayed as the final result.

Each LLM has a maximum limit on the total number of tokens, which includes both the tokens in the input prompt and the tokens in the generated output. You can view those limits in the LLM descriptions in the Large language model dropdown menu. For more information about tokens, see [Tokens and tokenization](#)

1. In the *Parameters* section, for *Maximum generated tokens*, enter **250**.

Parameters ⓘ

Constrain the length of the generated output.

Minimum generated tokens

1

Maximum generated tokens

250

2.5.10 Test the Gen AI Task

We can use the default value for the input quote variable to test our Gen AI Task.

Variable	Value	RAM
fileContentText	Corp to withdraw the monthly services fee from he specified	

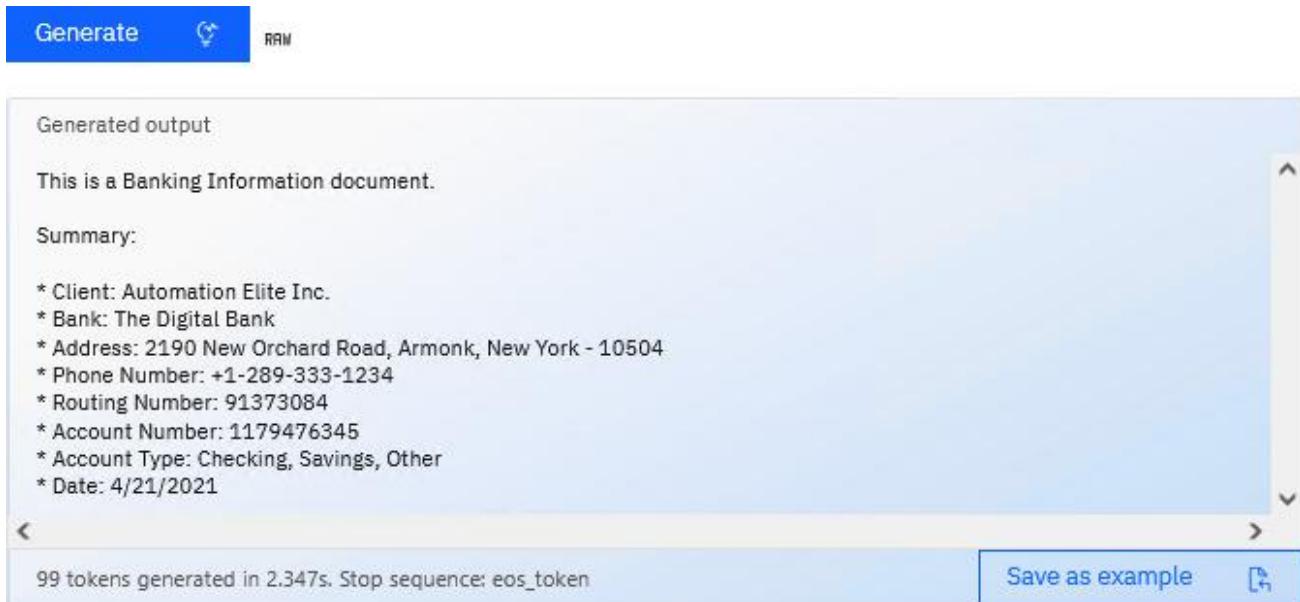
1. Click the **Generate** button.

Parameters ⓘ

Constrain the length of the generated output.

Generate  RAM

_2. You should now see that the document has been correctly identified and labeled as "Banking Information," with the document summary included below.



The screenshot shows a generated output document. At the top, there are buttons for 'Generate' and 'RAW'. Below the main content area, there is a 'Generated output' section containing the text: 'This is a Banking Information document.' followed by a 'Summary:' section listing various details:

- * Client: Automation Elite Inc.
- * Bank: The Digital Bank
- * Address: 2190 New Orchard Road, Armonk, New York - 10504
- * Phone Number: +1-289-333-1234
- * Routing Number: 91373084
- * Account Number: 1179476345
- * Account Type: Checking, Savings, Other
- * Date: 4/21/2021

At the bottom of the output area, it says '99 tokens generated in 2.347s. Stop sequence: eos_token'. To the right, there is a 'Save as example' button with a clipboard icon.

Note the **Save as example** button. If you decide to train the model with a set of documents (multi-shot prompt), you can use it to add this run to the training example section. Also note that 99 tokens were generated, which is why we increased the maximum generated tokens to 250.

2.5.11 Map Gen AI Task Activity to Service Flow Variables

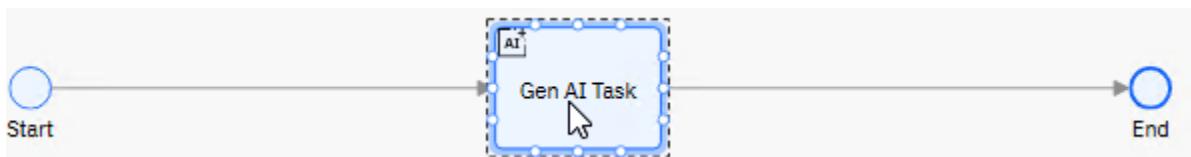
We will map the Gen AI Task output variables to the Service Flow's output variables. This will allow the callers of the Service Flow to interact with the Gen AI Task.

Note that we do not need to map the quote variable explicitly because it has already been associated as input to the Gen AI Task in the Gen AI Editor.

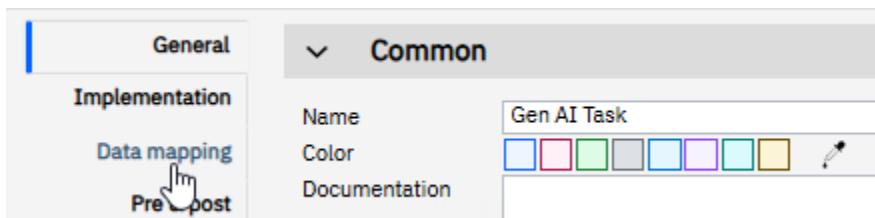
_1. Click the **Diagram** tab.



_2. Select the **Gen AI Task** activity.



_3. Click the **Data Mapping** tab.



The screenshot shows the 'Data mapping' tab selected in the left sidebar of a configuration interface. The right panel displays the 'Common' settings for the 'Gen AI Task' activity. The 'Name' field is set to 'Gen AI Task'. The 'Color' field has a color palette with several options, and the currently selected color is a light blue. There is also a documentation field and a small edit icon.

4. On the *Generated text (string)* variable, click the **variable picker icon**.

5. Select **generatedText**.

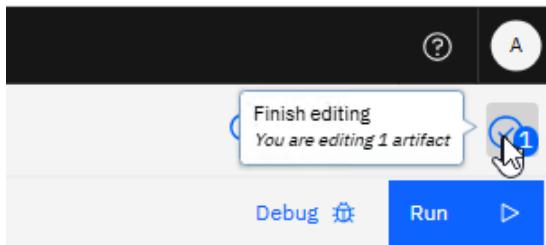
6. Click the "Magic Wand" icon.

7. Unselect the "Generated text" variable and click **Finish**.

Variable name	Variable type	Input	Output
<input type="checkbox"/> Generatedtext	String	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Generatedtokencount	Integer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Inputtokencount	Integer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Stopreason	String	<input type="checkbox"/>	<input type="checkbox"/>

This action will create private variables to map the Gen AI Task variables. We can use private variables since they don't need to be mapped as the Output of the Service Flow. The users of the Service Flows are not interested in the internal workings of the LLM!

_8. Click the "Finish editing" icon to ensure that all your work is saved.

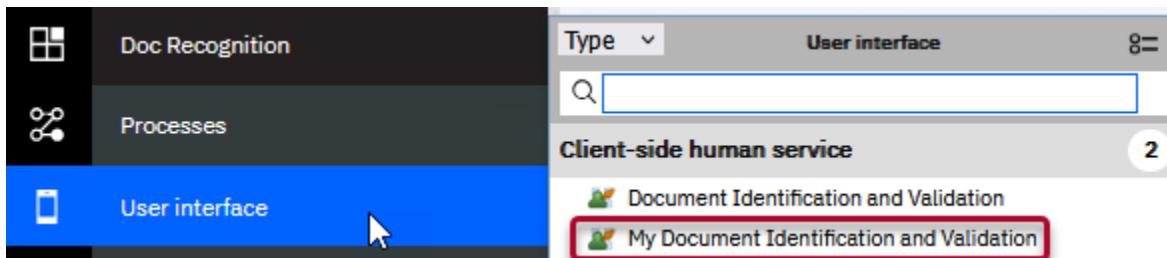


2.6 Add Gen AI Service Flow to Human Task

The Gen AI Service Flow (My Gen AI Document Processing) you just authored is intended for use in the Human Task invoked from the Porcurmente Porcess.

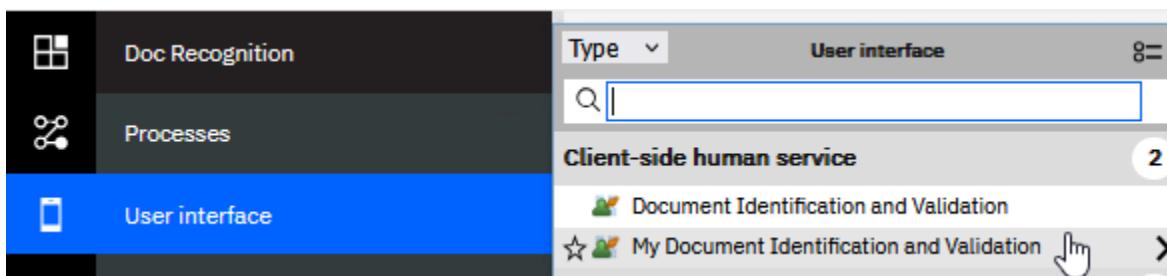
In this lab, we have partially authored the Human Activity (the official term is Client-side Human Service – CSHS) for you. Your task is to add and configure the "My VerifyDoc" Service Flow that you have just authored (My Gen AI Document Processing).

We have also created a partially implemented Human Task Activity for you: *My Document Identification and Validation*. You will need to configure it to invoke the *My VerifyDoc* Service Flow you just created.

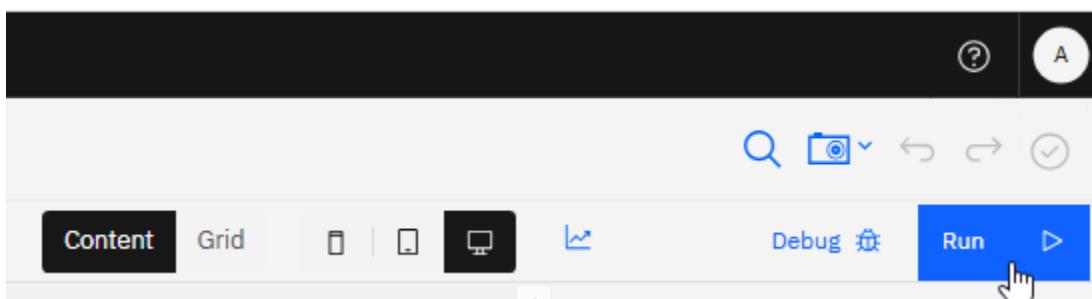


2.6.1 Examine the "My Document Identification and Validation" Client Side Human Service

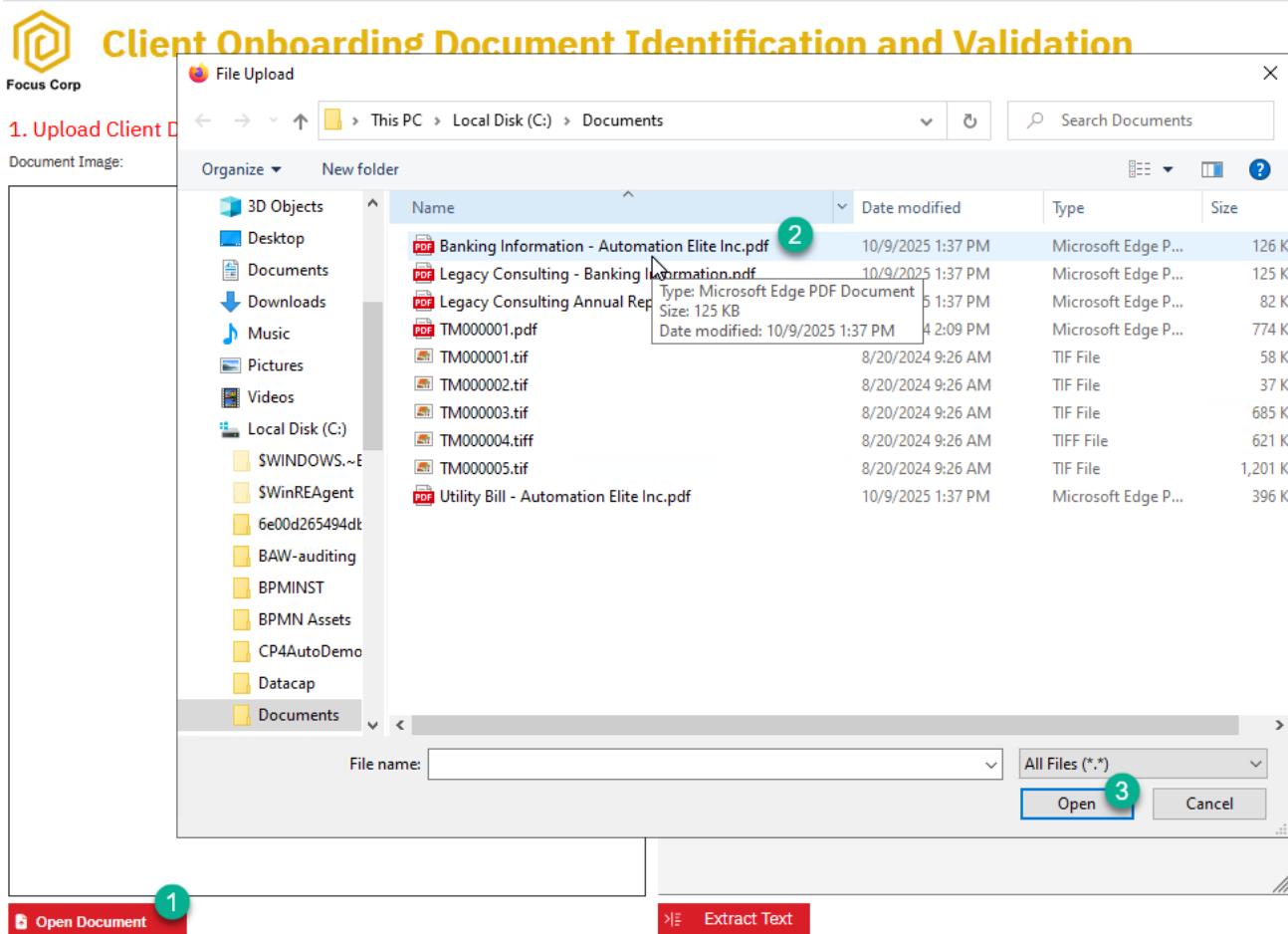
_1. Click **User interface**, and then click **My Document Identification and Validation**.



_2. Click the **Run** button.



3. Click the "Open Document" button, navigate to the C:\Documents directory, select **Banking Information – Automation Elite Inc.pdf**, and then click **Open**.



_4. Click the **Extract Text** button to extract text from the PDF document.

Document Contents:

Banking Information Focus Corp

This banking information provided here will be used by Focus Corp to withdraw the monthly services fee.

Client Name
Automation Elite Inc.

Bank Name
The Digital Bank

Bank Phone Number
+1-289-333-1234

Bank Address
2190 New Orchard Road, Armonk, New York - 10504

Routing Number
91373084

Account Number
1179476345

Account Type
Checking Savings Other

By submitting this form, you authorize Focus Corp to withdraw the monthly services fee from the specified bank account.

Date
4/21/2021

Extract Text

_5. Click the "**Generate Summary**" button, and note that nothing happens.

Gen AI Generated Document Summary:



Generate Summary

In the next few lab steps, you will configure the Client-side Human Service UI to send the document text to the Gen AI Service Flow you created and display the document classification and summary.

_6. Click the X button to close the Chrome Web Browser Window.

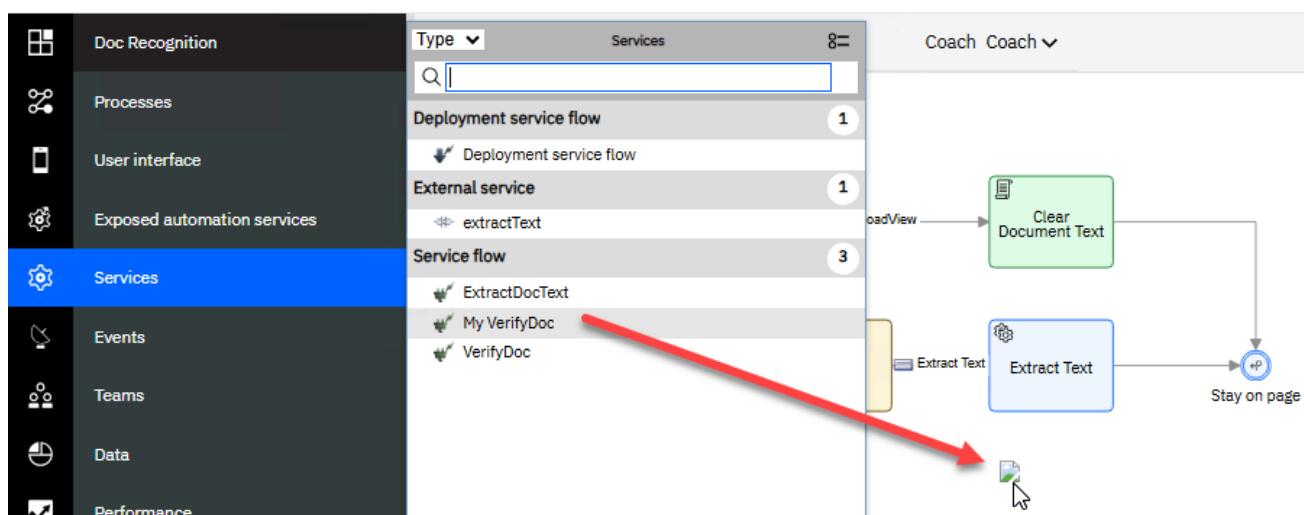


2.6.2 Add "My VerifyDoc" Service Flow

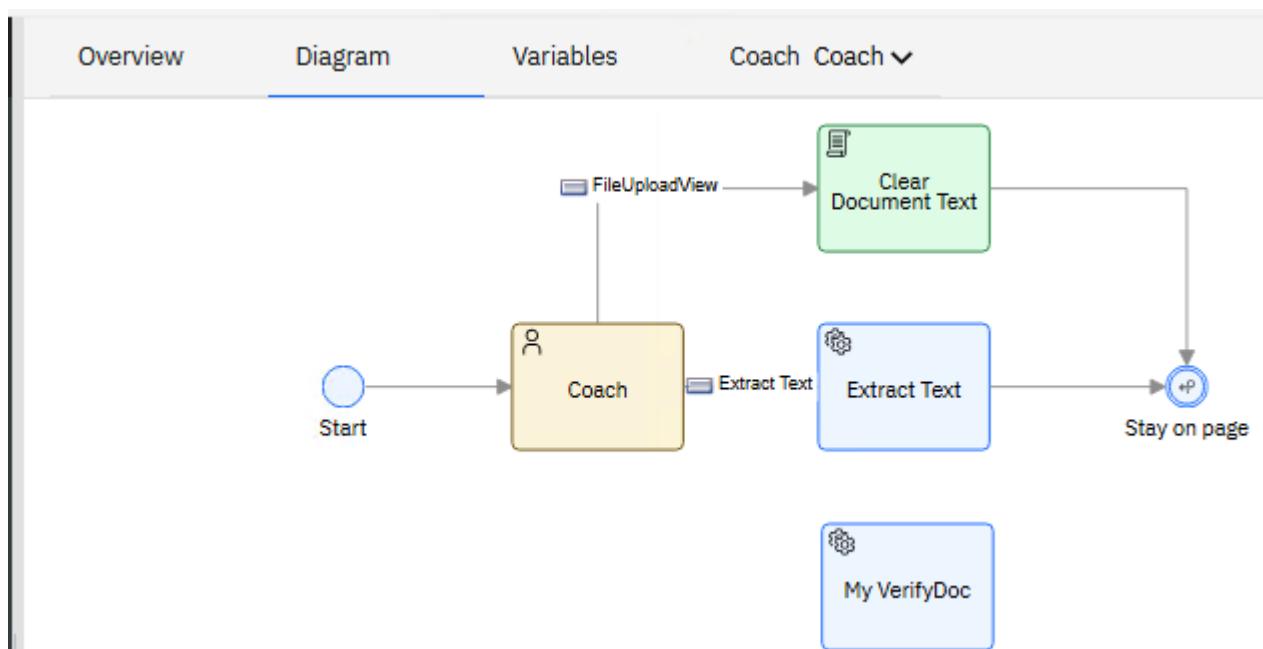
_1. Click the **Diagram** tab.



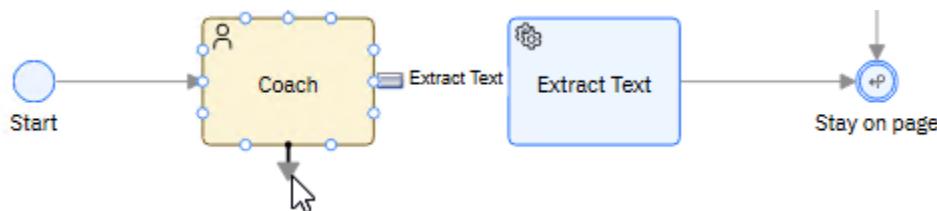
_2. Click "Services," then drag and drop "My VerifyDoc" onto the Diagram.



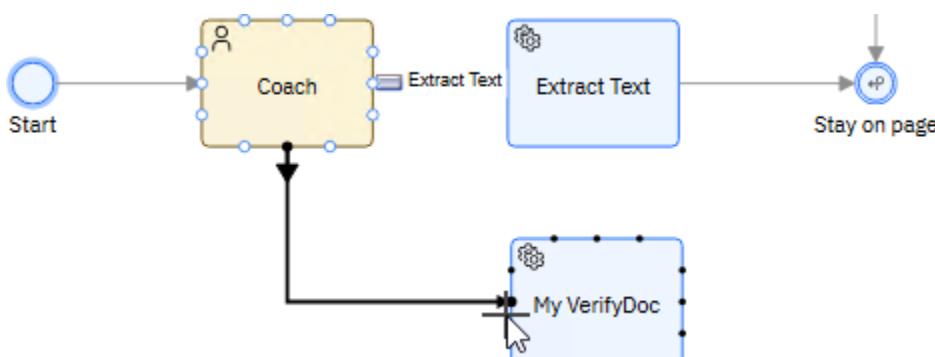
_3. Please verify that the Diagram now includes the **My VerifyDoc** Service Flow you dragged.



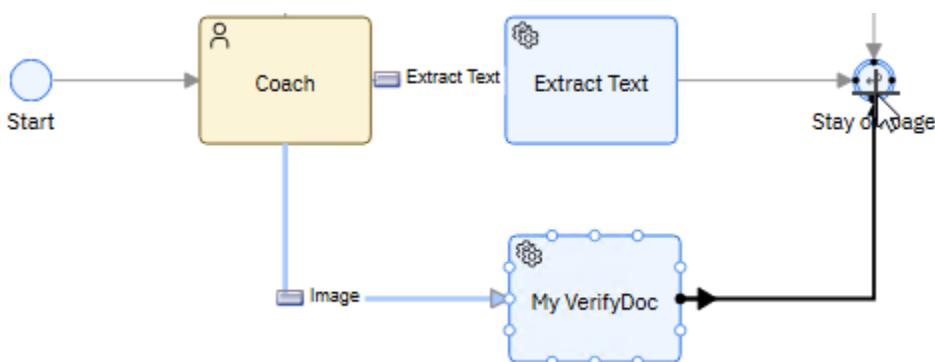
- _4. Hover over the bottom right boundary of the **Coach** Activity – you should see a connecting arrow as shown below.



- _5. While holding down the left mouse button on the connecting arrow, make a connection to **My VerifyDoc** Activity.



- _6. Connect **My VerifyDoc** Activity to **Stay on Page**. Use the method described in steps 4-5.

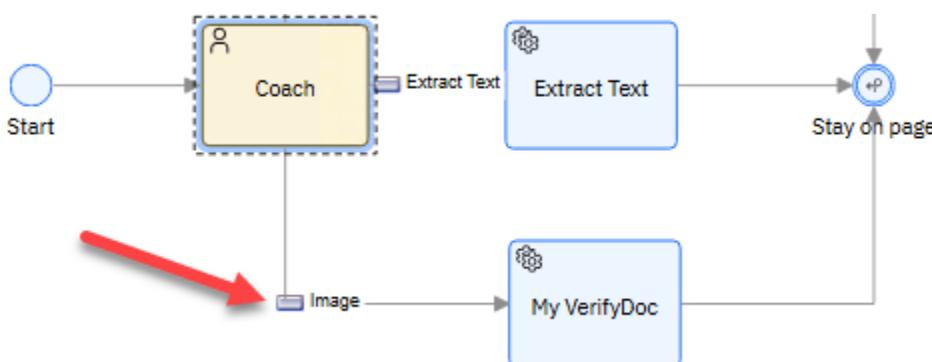


This connection ensures that after you execute the *My GenAI Document Processing* Activity, control returns to the UI.

2.6.3 Associate "Generate Summary" Button with "My VerifyDoc" Service Flow

By default, the Generate Summary Button in the Coach was not associated with My VerifyDoc Service Flow. Let's correct this.

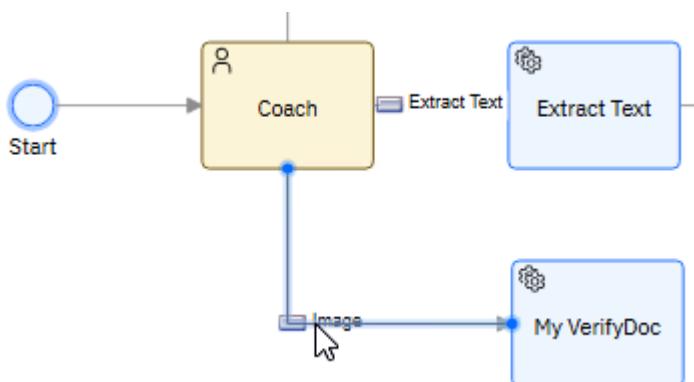
- _1. Note that the button associated to Coach and My VerifyDoc is the *Image* button.



Note that the Image button is the Focus Corp logo!
We don't want the Gen AI service to start when we click the logo image.

The screenshot shows a software interface for managing user interface components. In the center, there's a preview window displaying a page with a yellow hexagonal logo for 'Focus Corp' and some placeholder text like '{{tw.local.title}}'. To the right of the preview is a sidebar with sections for 'All Components', 'Drag a component to ...', 'All views', and a search bar. Below the preview is a configuration panel with tabs for 'General', 'Positioning', 'Configuration', and 'Events'. The 'Common' tab is currently selected. It contains fields for 'Label' (set to 'Image') and 'Help'. On the right, under the 'Behavior' tab, there's a 'View:' dropdown set to 'Image (URL) UI Toolkit' and a 'Label visibility' checkbox. A red arrow points from the Focus Corp logo in the preview to the 'Image' label in the 'Common' tab.

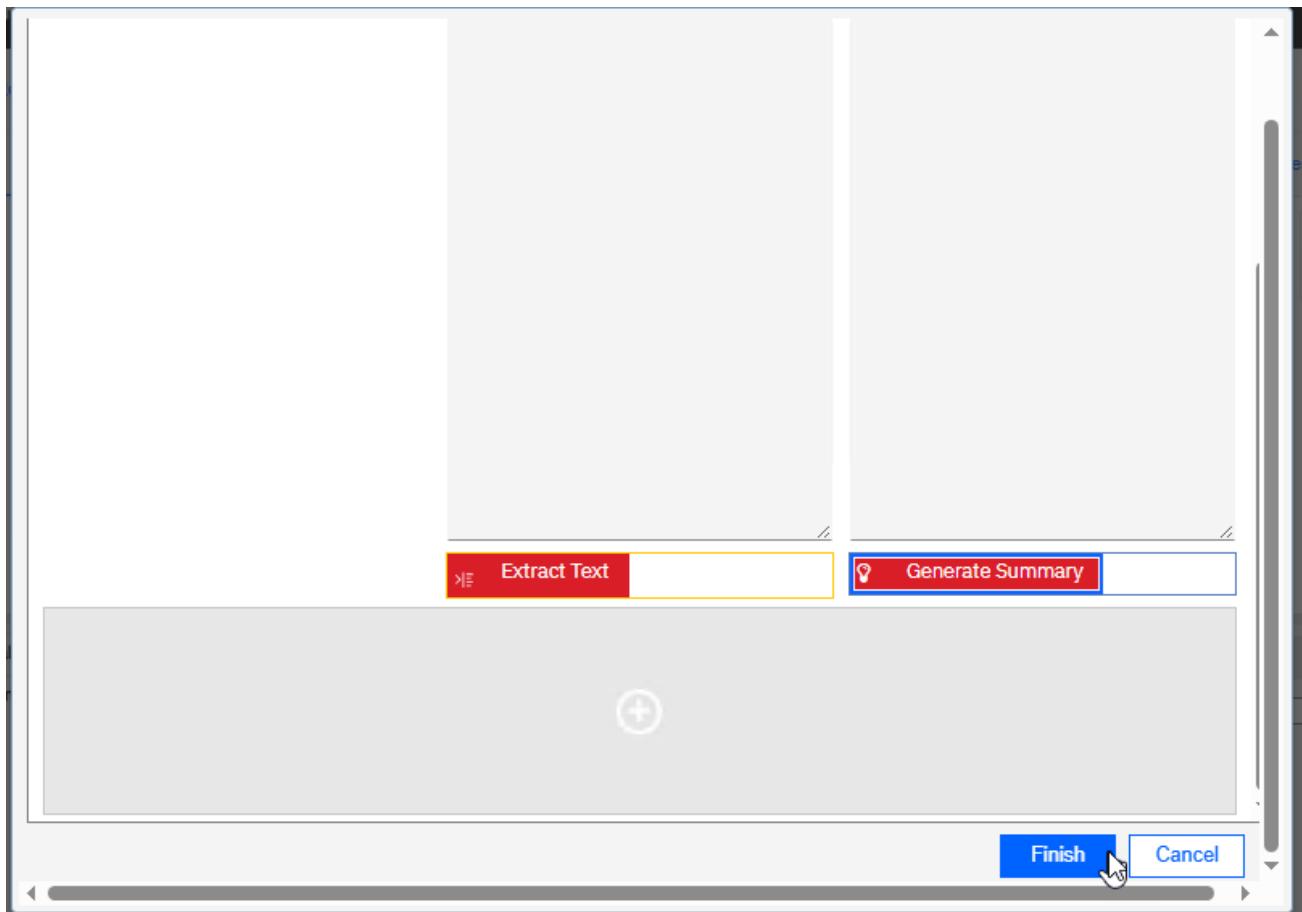
_2. Click the **Image** link.



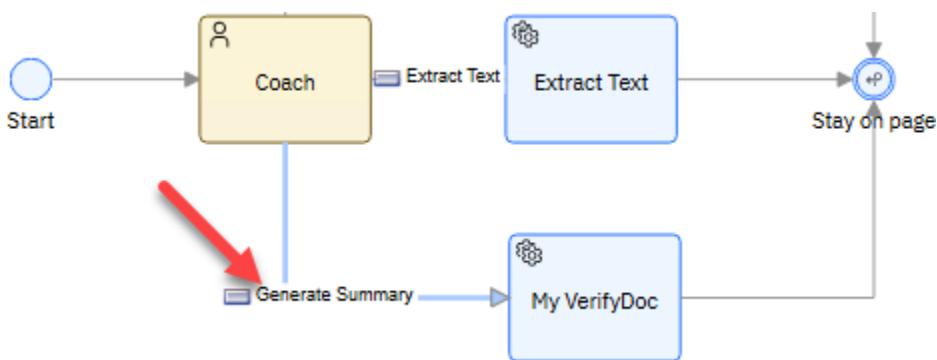
_3. Click the "**Select...**" button.

This screenshot shows the 'Behavior' configuration panel for the 'Coach' state. It includes fields for 'End state binding' (set to 'Image') and 'Show end state' (with a checked checkbox). A blue cursor arrow points directly at the 'Select...' button, which is highlighted with a blue border.

4. Select the **Generate Summary** button and click **Finish**.



5. Verify the link is now associated with the **Generate Summary** button.



2.6.4 Map "My VerifyDoc" Service Flow Interface

Before we perform variable mapping, let's examine the figure below to understand the flow and the variables involved.

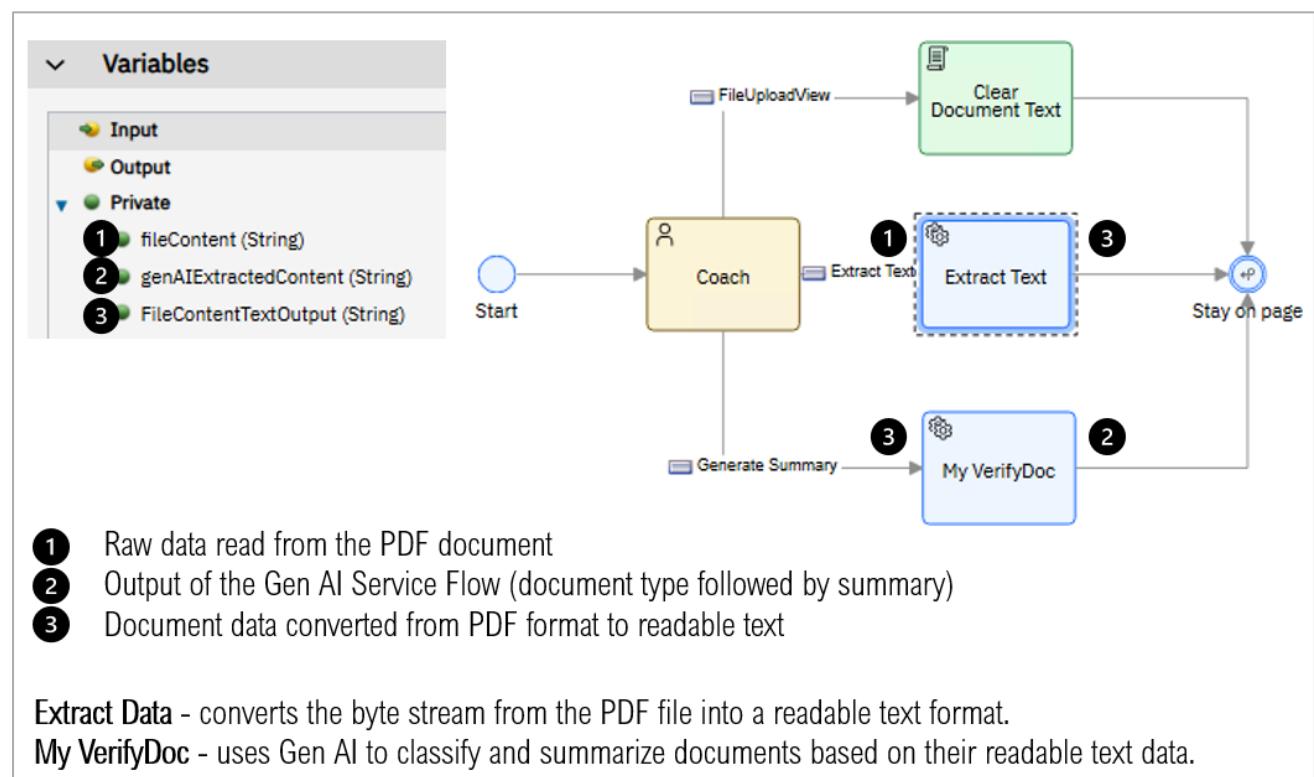
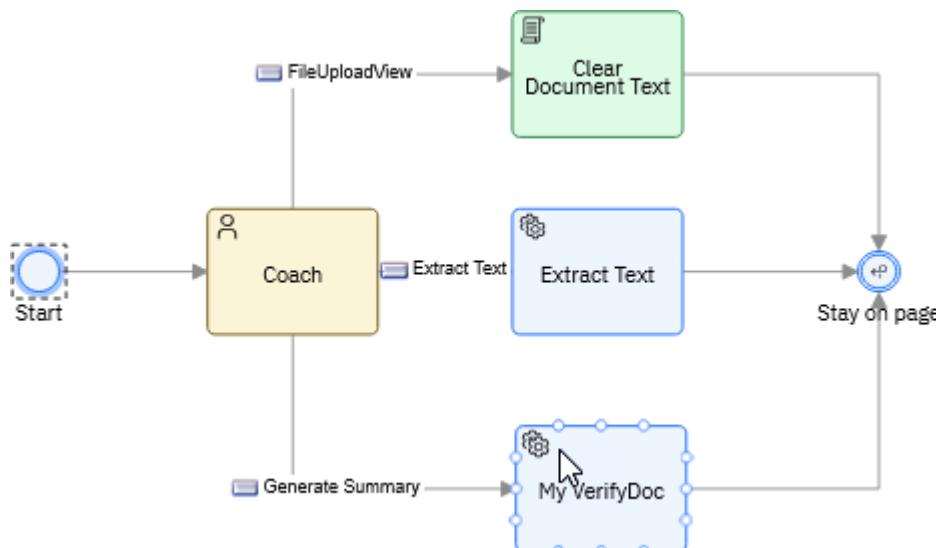
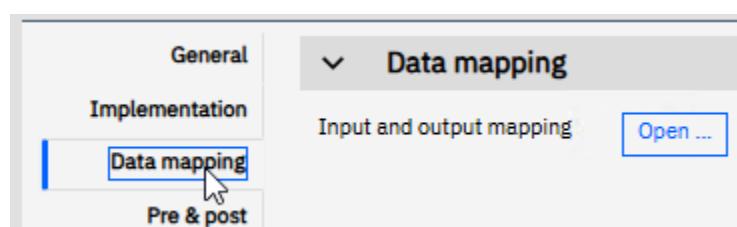


Figure 2. Service Flows and Variables

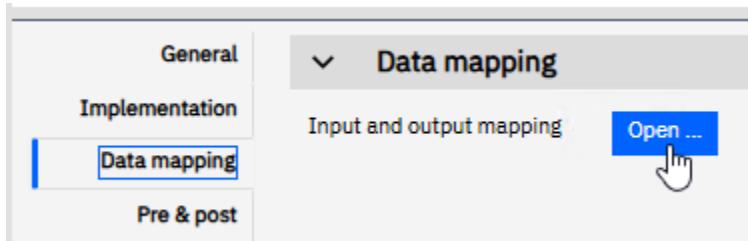
_1. Click the "My VerifyDoc" Activity.



_2. Click the **Data mapping** tab.



_3. Click **Open...** to open the Mapping Editor.



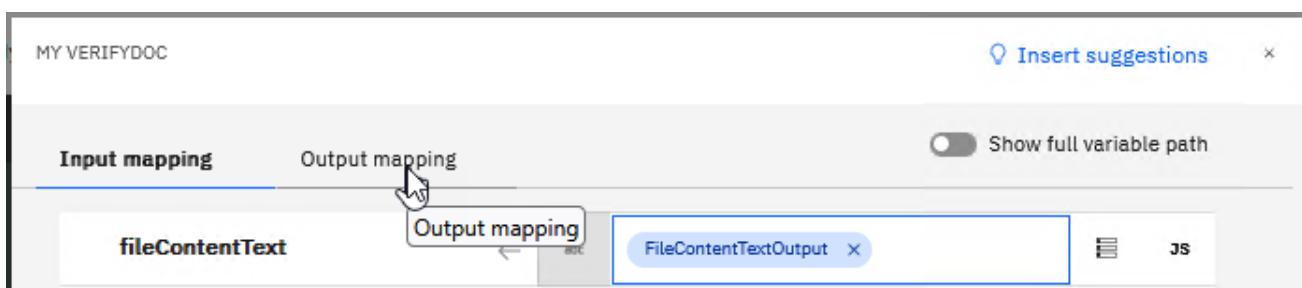
_4. Click the **Select a variable** icon.



_5. Select the **FileContentTextOutput** variable.



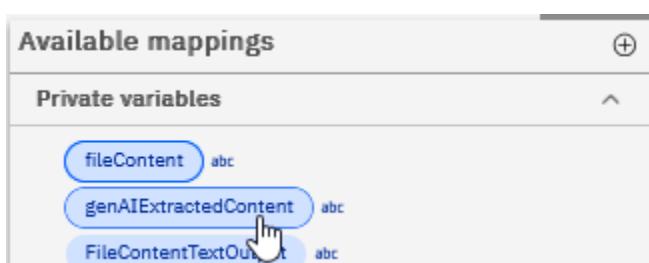
_6. Click the **output mapping** tab.



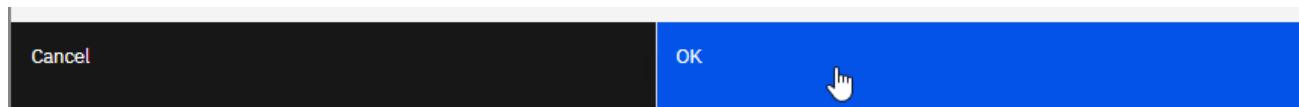
_7. Click the **Select a variable** icon.



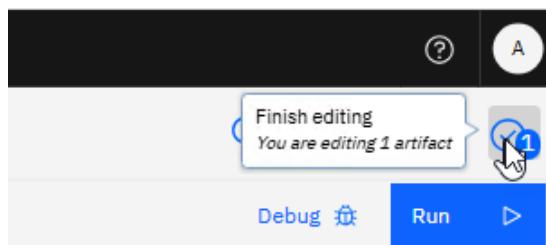
_8. Select the **genAIExtractedContent** variable.



_9. Click **OK** to close the Mapping Editor.

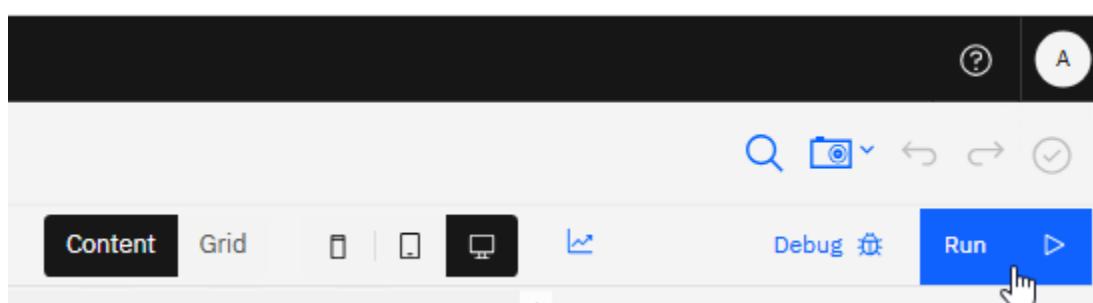


_10. Click the "Finish editing" icon to ensure that all your work is saved.

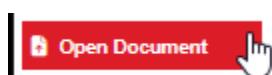


2.7 Test the "My Document Identification and Validation" CSHS

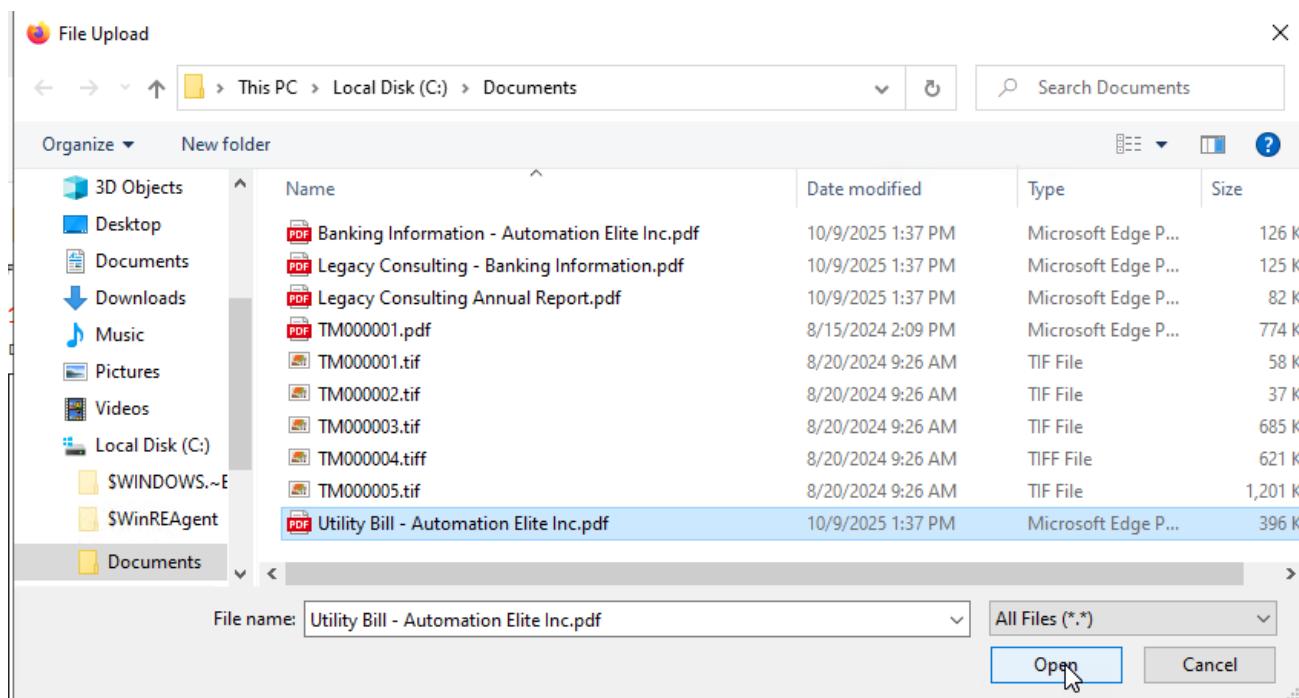
_1. Click the **Run** button.



_2. Click the **Open Document** button.



_3. From **C:\Documents**, select **Utility Bill - Automation Elite Inc.pdf** and click **Open**.



_4. Verify that the document image appears as shown below:

1. Upload Client Document

Document Image:



Open Document

_5. Click the Extract Text button.

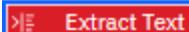


_6. Verify that the extracted text appears as shown below:

2. Extract Text from Client Document

Document Contents:

Monthly Statement Summary
 Previous Balance
 Payment Received
 New Charges - see details
 Total Amount Due
 \$ XXX
 -\$ XXX
 \$ XXX
 \$ XXX
 Company
 Logo
 Company
 Name/Logo
 Account No. XXXX
 Bill Period. XXXXX
 Page 1/2
 Bill Period
 Bill Due On
 Account Number XXXX
 Bill Period
 Bill Due On
 Amount Due. \$
 Amount Enclosed
 COMPANY NAME
 PO BOX XXX
 CITY, STATE, ZIP CODE
 90238405792836401893742936109147081394837
 470391934031971
 Service For
 Ways to Pay:
 You may pay your bill by sending a check
 using the enclosed return envelope. You may
 also opt to pay with your credit or debit card
 via our website. You can also enroll your
 card for auto debit option for your
 convenience.
 Bill Saving Tips:
 Internet speed quality depends on the
 number of users in your home and what
 you're using it for. Grandparents aren't going
 to have the same need for internet speed as

 Extract Text

_7. Click the **Generate Summary** button.

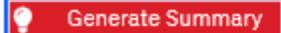
 Generate Summary

_8. Verify that the AI-generated output appears as shown below:

3. Generate Client Document Summary

Gen AI Generated Document Summary:

This document is a Bill.
 Summary:
 * Company: Automation Elite
 * Address: 3974 Carson St, Lansing, MI 48911
 * Account Number: 1109646555
 * Bill Period: 04-01-2022 - 05-01-2022
 * Bill Due On: 05-05-2022
 * Contact Information: +1 800-354-8373, www.cableporium.com,
 accessibility@company.com, or write to the address.

 Generate Summary

_9. If you like, repeat steps 2-8 to try the other four documents.

 [Banking Information - Automation Elite Inc.pdf](#)

 [Legacy Consulting - Banking Information.pdf](#)

 [Legacy Consulting Annual Report.pdf](#)

This marks the end of the lab.

Notices and disclaimers

© 2025 International Business Machines Corporation. No part of this document may be reproduced or transmitted in any form without written permission from IBM.

U.S. Government Users Restricted Rights – use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM.

This document is current as of the initial date of publication and may be changed by IBM at any time. Not all offerings are available in every country in which IBM operates.

Information in these presentations (including information relating to products that have not yet been announced by IBM) has been reviewed for accuracy as of the date of initial publication and could include unintentional technical or typographical errors. IBM shall have no responsibility to update this information.

This document is distributed "as is" without any warranty, either express or implied. In no event, shall IBM be liable for any damage arising from the use of this information, including but not limited to, loss of data, business interruption, loss of profit or loss of opportunity. IBM products and services are warranted per the terms and conditions of the agreements under which they are provided. The performance data and client examples cited are presented for illustrative purposes only. Actual performance results may vary depending on specific configurations and operating conditions.

IBM products are manufactured from new parts or new and used parts.

In some cases, a product may not be new and may have been previously installed. Regardless, our warranty terms apply."

Any statements regarding IBM's future direction, intent or product plans are subject to change or withdrawal without notice.

Performance data contained herein was generally obtained in a controlled, isolated environments. Customer examples are presented as illustrations of how those customers have used IBM products and the results they may have achieved. Actual performance, cost, savings or other results in other operating environments may vary.

References in this document to IBM products, programs, or services does not imply that IBM intends to make such products, programs or services available in all countries in which IBM operates or does business.

Workshops, sessions and associated materials may have been prepared by independent session speakers, and do not necessarily reflect the views of IBM. All materials and discussions are provided for informational purposes only, and are neither intended to, nor shall constitute legal or other guidance or advice to any individual participant or their specific situation.

It is the Customer's responsibility to ensure its own compliance with legal requirements and to obtain advice of competent legal counsel as to the identification and interpretation of any relevant laws and regulatory requirements that may affect the Customer's business and any actions the Customer may need to take to comply with such laws. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the Customer follows any law.

Notices and disclaimers (Continued)

Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products. IBM does not warrant the quality of any third-party products, or the ability of any such third-party products to interoperate with IBM's products. **IBM expressly disclaims all warranties, expressed or implied, including but not limited to, the implied warranties of merchantability and fitness for a purpose.**

The provision of the information contained herein is not intended to, and does not, grant any right or license under any IBM patents, copyrights, trademarks or other intellectual property right.

IBM, the IBM logo, and ibm.com are trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at: www.ibm.com/legal/copytrade.shtml.