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neostella best practices

Neostella's UiPath Document Understanding (DU) tool trains RPA software robots to process everyday documents like invoices, purchase orders, and sales orders. A logical solution for paper processes that involve repetitive data entry and extraction, DU can help your organization process more paper forms more efficiently and free up staff to focus on more valuable work.

preparing for uipath document understanding

Just like taking on any new project, a project's long-term success depends on your level of preparedness.

A DU solution is no different. The better equipped our experts are to understand which document fields require extracting and any possible variations within those documents, the better prepared we will be to make the important long-term technical decisions associated with your DU model.

In addition to thinking about the document types and data fields, your organization should:

Prepare sample documents: The speed, quality, and success of your DU solution is entirely dependent on the amount and quality of sample data you provide. In identifying which document types will be suitable for DU, make sure to provide a wide range of sample PDFs.

Think of the solution holistically: Critically think about your organization's data flow. What happens once the data is extracted and where is that information stored? The cleaner and more organized the structure of your data flow is, the easier DU implementation will be.

Proactively identify variations: Do your documents have missing data or empty fields? Do you have documents that are multiple pages long? If variations aren't included in your sample selection, your DU solution will be unprepared to handle these variations. Being proactive rather than reactive by providing us with all sample variation data up front means your solution will be up and running much faster.

Ask questions: The more we know, the more we can assist you after DU is deployed.

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sample document checklist:
what we need from you

At least 30 sample documents for each document type; 20 for training-validation and 10 for testing purposes*

*If there are different vendors, we need sample documents per each vendor

Folders corresponding to each document type

All document PDFs must be in the same format

At least one document that highlights the relevant extraction fields

Label keywords for classification purposes in at least one document

All possible variations for each document type

examples of variations

Documents with empty fields / missing data

Documents having multiple pages or multiple sub-pages in one page

Documents with field values having long or multiple lines

Documents having multiple un-used document types in the same file

after implementing du

HAVE REALISTIC EXPECTATIONS:
DU is a powerful tool that can eliminate headaches and ease workload so that staff can allocate time towards more rewarding tasks. However, powerful solutions take time to grow. Because DU is a continuous training solution, our bots will continue to retrain and learn, meaning that your solution will also be continuously evolving, and you will experience more ROI over time.
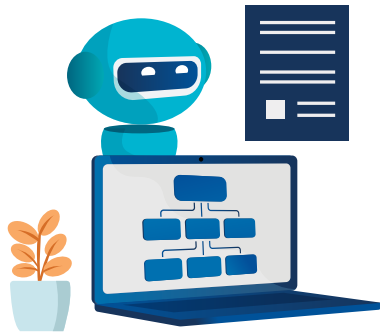
EXPECT CONTINUOUS INVOLVEMENT:
Throughout your DU solution, a human will still need to be involved to respond to notifications and validate exceptions that are received to the UiPath Action Center. This will help our bots get smarter and understand your documents better over time.

example invoice for document understanding

This demonstrates an example invoice. The highlighted fields indicate the data that the client would be interested in having extracted for Document Understanding. All fields are on a single line and do not show any variations.

Company Name
Your Company Slogan

INVOICE

Street Address
City, ST ZIP Code
Phone: Phone Fax: Fax

INVOICE # 100
DATE: DATE

TO:
Recipient Name
Company Name
Street Address
City, ST ZIP Code
Phone: Phone

SHIP TO:
Recipient Name
Company Name
Street Address
City, ST ZIP Code
Phone: Phone

COMMENTS OR SPECIAL INSTRUCTIONS:
To get started right away, just tap any placeholder text (such as this) and start typing to replace it with your own.

SALESPERSON	P.O. NUMBER	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
					Due on receipt

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
10	Desk chairs	$100	$1,000

SUBTOTAL		
SALES TAX		
SHIPPING & HANDLING		
TOTAL DUE		

Make all checks payable to Company Name
If you have any questions concerning this invoice, contact Name, Phone, Email

THANK YOU FOR YOUR BUSINESS!

Company Name
Your Company Slogan

INVOICE

Street Address
City, ST ZIP Code
Phone: Phone Fax: Fax

INVOICE # 100
DATE: DATE

TO:
Recipient Name
Company Name
Street Address
City, ST ZIP Code
Phone: Phone

SHIP TO:
Recipient Name
Company Name
Street Address
City, ST ZIP Code
Phone: Phone

COMMENTS OR SPECIAL INSTRUCTIONS:
To get started right away, just tap any placeholder text (such as this) and start typing to replace it with your own.

SALESPERSON	P.O. NUMBER	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
Bob Smith	PO# 123456, 345678, 891112, 234567				Due on receipt

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
10	Desk chairs 10 Freight on 1 pallet ***Do not double stack pallets***	$100	$1,000

SUBTOTAL		
SALES TAX		
SHIPPING & HANDLING		
TOTAL DUE		

Make all checks payable to Company Name
If you have any questions concerning this invoice, contact Name, Phone, Email

THANK YOU FOR YOUR BUSINESS!

example invoice for document understanding with variations

This demonstrates an example invoice containing field variations. The areas highlighted indicate a specific variation where the field values contain multiple lines of text. This is important information to have prior to implementing Document Understanding.

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