

**Automating UiPath Document Understanding**

**Course Number:** RPA-122  
**Duration:** 5 days

**Overview**

This live, online  Automating UiPath Document Understanding training course teaches attendees how to successfully use UiPath Document Understanding in their UiPath automated processes, such as invoicing. The course takes students step-by-step through both theoretical knowledge and practical implementation of Document Understanding. Participants then apply their new UiPath automation skills to create a standard invoicing process, using sample invoices provided by Accelebrate.

**Note:** We recommend a maximum of 10 students, but can accommodate up to 12 students per class.

**Prerequisites**

All students must know the UiPath suite and have taken [UiPath Foundation](file:////training/uipath-foundation) and [Advanced UiPath](file:////training/uipath-advanced) or have the equivalent experience.

**Materials**

All UiPath RPA training students receive comprehensive courseware.

**Software Needed on Each Student PC**

For virtual classroom sessions:

* Prior to the course, Accelebrate will provide a virtual learning platform (Zoom).
* An email with detailed instructions will be sent in advance.
* Access to an internet connection is essential.
* A headset with a microphone is recommended for the session.

**Objectives**

* Understand the framework and all stages of a Document Understanding project
* Work with main concepts including modeling, training, human-in-the-loop validation, and post-processing in UiPath
* Build and configure the elements of a Document Understanding project and know how to put them into practice

**Outline**

* Introduction – What is Document Understanding?
  + What is a Document?
  + Document Understanding Overview
  + OCR vs. Document Understanding
* Document Understanding Framework – Deep Dive
  + Taxonomy
    - Creating Items in Taxonomy
    - Loading them into a workflow
  + Digitize
    - Scanned vs. Native Documents
    - OCR Engines
  + Classify
    - Breakdown of Different Classifier Types
    - Training Intelligent Keyword Classifier
    - Classification Station Overview
  + Extract
    - Overview of Extractor Types (RegEx, Form, Machine Learning)
    - Out-The-Box Models
    - Generic Model Training
    - Configuring Extractors
  + Validate
    - Human-in-the Loop
    - Validation Station Overview
    - Useful Shortcuts
  + Export
    - Export Overview, working with Datasets
  + Train
    - Train Overview
  + Task 1: Build a Basic DocU Workflow for Purchase Order Extraction (using an Out-Of-The-Box Model)
* Modified Best Practice DocU Framework
  + Limitations of Linear Framework
  + Walkthrough of Best Practice Framework
  + Task 2: Build Best Practice DocU Framework for Invoice Extraction (using OOTB Model)
* AI Center – Deep Dive
  + AI Center Overview & Use Cases
  + Create Data Labelling Session
  + Create ML Package and Pipeline
  + Deploy ML Skill and Integrate with UiPath
  + Task 3:
* End-to-End Implementation
  + Overview of Typical E2E Process Flow
  + Action Center Overview
  + Updates to DocU Framework
  + Task 4:
* Conclusion